



**Core Competencies:
Training Needs for
Leadership Development**

Community Sector Council
Newfoundland and Labrador
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EXECUTIVE SUMMARY

The Community Sector Council Newfoundland and Labrador (CSC NL) is an independent organization, serving the social sector by promoting social and economic well-being. CSC NL endeavours, in collaboration with their partners, to create a prosperous and inclusive society that supports individuals, families and communities.

In both rural and urban Newfoundland and Labrador, the community sector represents a significant component of our communities. The community sector generates real economic value and is a means to building communities and regional economies through volunteerism and social action. In many rural Newfoundland and Labrador communities, the community sector delivers key public services such as ambulatory care, recreational facilities management, and fire/safety services, as well as many other key services. The important role of the community sector both to economic and social well being is indisputable.

A signature piece of CSC NL's undertakings is meeting the governance and training needs of leadership, volunteers, and paid staff in the community sector. In 2018, CSC NL embarked on a mission to engage with community sector organizations to identify key leadership competencies necessary for success within the sector and to fashion these competencies into a leadership model that could serve as a guide for skills development and succession planning. This report is the outcome of a seven-phase study by Training Works on behalf of the CSC NL to create a Leadership Competency Model for the Newfoundland and Labrador community sector. This model was created based on extensive research and sector engagement, including surveys and key informant interviews.

Once the model was created a skills-gaps analysis was conducted and the top five competencies for development were put forth as the starting point for skills development within the sector. Though there were slight variances in the skills development needs amongst organizations based on their size, location and the services they offered there were defined themes that emerged.

Based on the skills gap analysis, the strategic competencies recommended for development within the Newfoundland and Labrador community sector are: Strategic Planning, Financial Management, Evaluation, Program Implementation, and Strategic Partnering.

By offering training and support in these areas, leadership and teams throughout the province will be better prepared to create sustainable, successful organizations, that are able to offer the services and programs communities need.

Contained within this document is:

- A summary of key findings;
- A leadership competency model for the community sector;
- The CSC NL top five training priorities (and key outcomes) for the Newfoundland and Labrador community sector; and
- A training evaluation framework.

CREATING THE COMMUNITY SECTOR COUNCIL NEWFOUNDLAND AND LABRADOR LEADERSHIP COMPETENCY MODEL

PURPOSE OF A COMPETENCY MODEL

The CSC NL Competency Model, created for this project, defines the starting point for successful performance of leadership within the Newfoundland and Labrador community sector. This competency model also facilitated the skills gap analysis and the subsequent high priority training recommendations.

It is hoped this competency model will serve as a useful talent management tool for community sector organizations within the province when developing leadership capabilities within their organizations. The CSC NL competency model can enhance hiring and succession planning efforts within the sector by defining the required behaviours of leaders, and can also be utilized to assess and identify employee and volunteer skills development needs.

* It should be noted that given the ever-changing nature of leadership roles within the community sector, this model is meant as a starting point and is envisioned as being evergreen; that it will continue to evolve alongside the changing roles of leadership within the sector.

How was the competency model constructed?

PHASE ONE: RESEARCH AND AGGREGATION OF FINDINGS

- An environmental scan of trends in leadership development. The primary focus was a jurisdictional scan within the community sector;
- Gathering and reviewing research and documentation compiled by CSC NL to provide a mental model of the community sector landscape within Newfoundland and Labrador.
- An internet scrape of job postings for leadership within the community sector (provincially, nationally, and internationally) to gather core competencies being sought and to give context to the roles and responsibilities expected from community sector leadership;
- A website review of CSC NL sector organizations (when available) to identify their strategic directions and lines of business;
- The completion of 423 online surveys with individuals within the community sector; and
- The completion of 28 key informant interviews to better understand the breadth and scope of leadership roles within the sector.

PHASE TWO: CREATING A SKILLS INVENTORY

- Conducting an environmental scan of leadership development and leadership job postings in other industries;
- Synthesizing the information from the documentation gathered in phase one; and
- Leveraging existing competency libraries to help further define the key competencies identified in this project.

PHASE THREE: DEVELOPMENT OF THE COMPETENCY MODEL

- Synthesized all the information gathered in phase one and phase two to create the CSC NL Competency Model.

RESEARCH FINDINGS TO SUPPORT THE DEVELOPMENT OF THE CSC NL COMPETENCY MODEL

Background - Survey

As part of this project an online survey was conducted to gain insight into core competencies and skills for staff and volunteers in the community sector. The purpose of the survey was to gather information to be used to help create a professional development program for leadership in non-profit and voluntary organizations in Newfoundland and Labrador. Executive directors and others in leadership positions, staff, volunteers, and board members were invited to take part. The following section summarizes the results of the survey.

Methodology

A list of contacts to be surveyed was provided by CSC NL and an invitation to complete the online survey was sent to a total of 3,273 contacts via email. The contacts were made up of leaders, board members, employees and volunteers. The email contained a link directing participants to the survey. An initial invitation to participate and a total of three reminders were sent over the course of four weeks in January and February 2019. A total of 423 completed the online survey during this period.

Table 1. Online Survey Completion Rate

Number of Contacts	Completed Interviews	Board/Leader	Employee/Volunteer	Completion Rate
3,273	423	255	168	13%

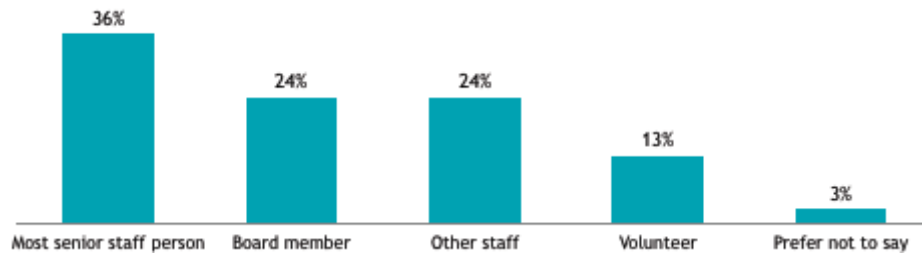
SUMMARY OF SURVEY RESULTS: RESPONDENTS

RESPONDENT PROFILE

The majority of respondents (36%) classified themselves as ‘most senior staff person,’ or those holding titles of: Executive Director, Director of Operations, Director of Programs, CEO, Co-ordinator, Manager, etc. Many of the same position titles, for example co-ordinator, manager, and director, appeared in the ‘other staff’ category as well, although these individuals were not the most senior staff person within their organization.

Most of the respondents were a part of very small organizations with 55% reporting 10 or fewer staff. More than 80% of the sample were in organizations of 50 staff or less.

Figure 1. Position Within Respondent’s Organization



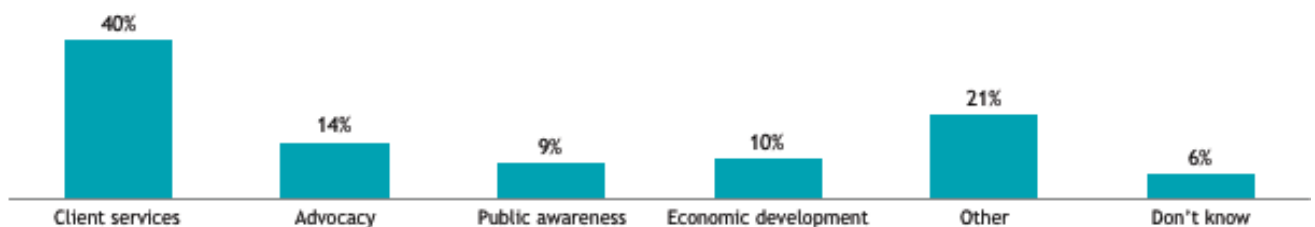
Although staff sizes were very small, organizational budgets were evenly spread between budgets of \$0 - \$19,999 and \$1 million or higher.

Figure 2. Organizational Budgets Reported by Respondents



When asked “Which of the following categories best describes the primary focus of your organization and the services it provides?” The most commonly reported organizational mandate involved providing client services to individuals or families (40%), followed by advocacy (14%), economic development (10%), and public awareness (9%).

Figure 3. Primary Services Reported by Most Senior Staff and Board Members



The community sector is incredibly diverse, employing individuals with varied expertise and experience, depending on the focus of the organization. To ensure a good breadth of organizations were represented in the survey results, respondents were provided with a list of mandates or areas of focus and asked to indicate ‘Which of the following categories best describes the primary focus of your organization and the services it provides?’ Table 1 below highlights the areas of focus represented.

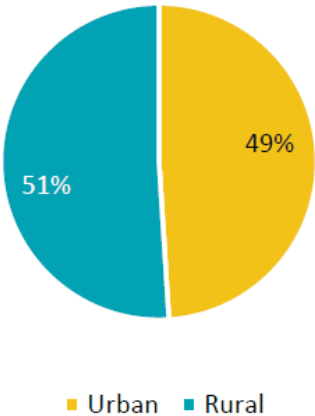
Table 1. Primary Focus Reported by Most Senior Staff and Board Members

Mandate	%	n
Community and economic development	19%	82
Family/Child Care/Youth	8%	35
Heritage/Preservation	8%	34
Recreation/Sports	8%	33
Health and wellness	7%	31
Arts and culture	5%	22
Business/Professionals/Industry Associations	5%	22
Education/Training/Employment	5%	21
Faith groups, religious organizations, churches	5%	21
Services for persons with disabilities	5%	21
Social services and housing	4%	17
Tourism	4%	16
Services for seniors	3%	13
Women’s organizations	3%	12
Environment	3%	11
Other	2%	8
Aboriginal	1%	6
Funding resources	1%	6
Emergency services	1%	5
Social Justice/Human Rights/Diversity/Inclusion	1%	4

Respondent Profile: Senior Staff and Board Members

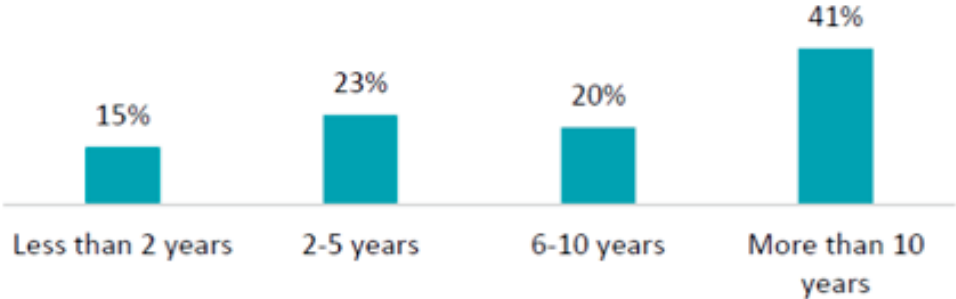
As seen in Figure 4, the urban/rural split amongst the 252 senior staff and board members surveyed was relatively even, reporting 49% and 51% respectively.

Figure 4. Urban and rural split of senior staff and board members



Four in 10 senior staff and board members, or 41%, have been in their position for more than 10 years. Another 20% have been in their position between six and 10 years, 23% between two and five years, and 15% have been in their current position for less than two years (Figure 5).

Figure 5. Years in current position for senior staff and board members

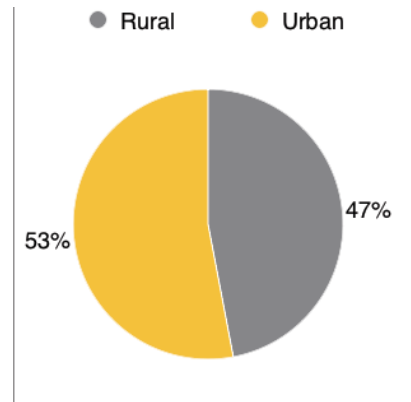


Finally, many senior staff and board members (57%), describe their organization’s size as micro (between 0 and 10 staff and regular volunteers), while another 33% describe their organization as small (between 11 and 50 staff and regular volunteers). Few described their organization’s size as medium (4%) or large (4%).

Respondent Profile: Staff and Volunteers

Among the 169 staff members and volunteers surveyed, slightly more reported being in an urban area (53%) compared to a rural area (47%) (Figure 6).

Figure 6. Urban and Rural Split of all Staff and Volunteers

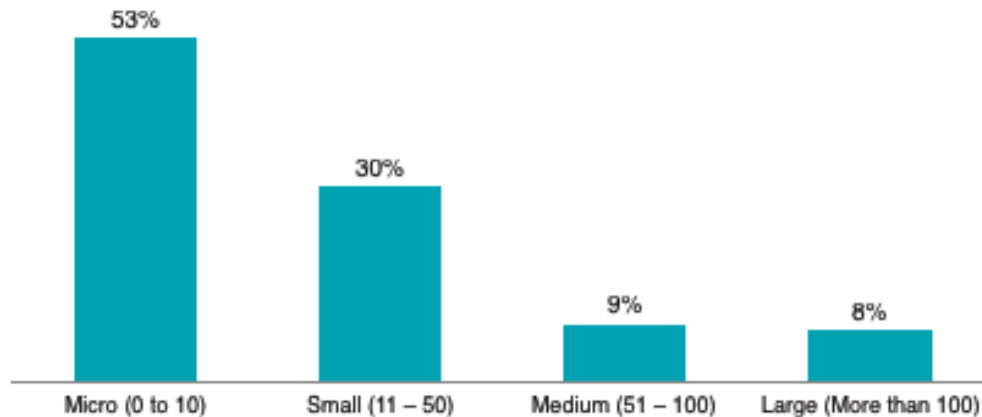


Just over one-third of staff and volunteers (35%) have been in their position for more than 10 years. Another 24% have been in their position between two and five years, while 17% were between 6 and 10 years, and 21% have been in their current position for less than two years.

Three in 10 staff and volunteers reported they didn't know the annual operating budget of their organization, while 15% each reported their operating budgets are being \$20,000 to \$99,999, and 15% reporting \$1 million or higher, followed by \$200,000 to \$599,999 (14%) and \$0 to \$19,999 (13%) .

Finally, the majority of staff and volunteers (53%) describe their organization's size as micro (between 0 and 10 staff and regular volunteers), while 30% describe their organization as small (between 11 and 50 staff and regular volunteers). Few described their organization's size as medium (9%) or large (8%) (Figure 7).

Figure 7. Organizational Size Described by Staff and Volunteers



SUMMARY OF SURVEY RESULTS: SKILLS

The following section is a summary of the results gathered in the survey, specific to the skills required for leadership success within the sector.

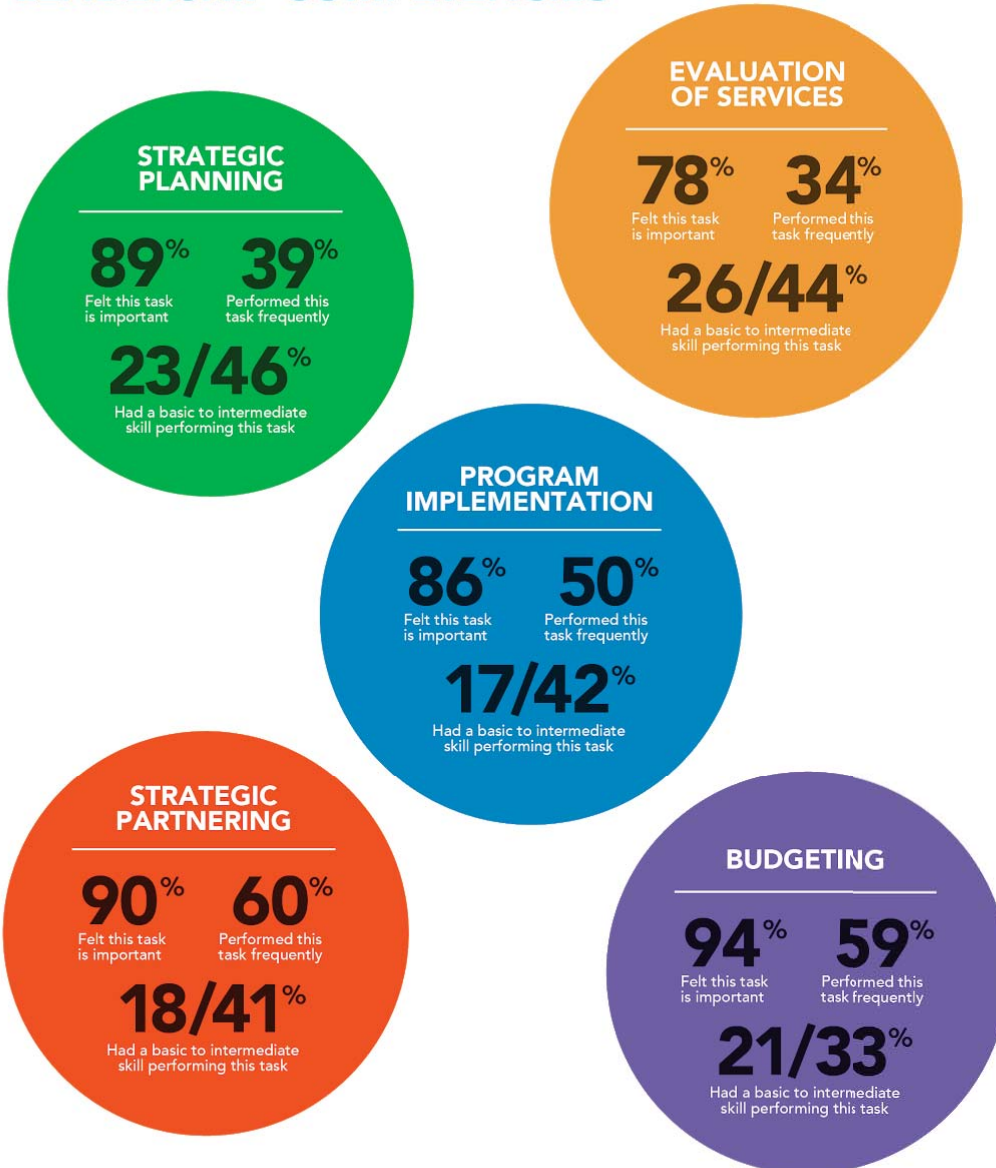
The research data has enabled us to align the importance, frequency, and knowledge levels for core skills. Using this assessment, we were then able to target the key competencies for success and development.

The first graphic is a high-level summary of the skills requirements identified for the sector, followed by three subsequent charts which further break-out the data by: rural vs. urban, organizational size (# of staff), and years of service. In depth data charts, with the numerical scale utilized for assessing the skills gaps can be found in appendix A.

As the following graphic highlights the primary areas for development include:

- Budgeting/accounting/financial management
- Community engagement/strategic partnering
- Program implementation
- Strategic planning
- Program evaluation: Evaluation of services and their impacts

COMMUNITY SECTOR COUNCIL NEWFOUNDLAND & LABRADOR LEADERSHIP COMPETENCIES



*Please see the appendices for more detailed information.

INSIGHTS INTO SKILLS NEEDS: LENGTH OF SERVICE

To further fine tune skills-training priorities, a skill-needs matrix was developed based on how long leaders had been in their current role.

In some cases, the longer the person was in the role, the stronger their skills became, for example, in critical/frequently used skills.

- Budgeting
- Program Planning

In other cases, when the skills were used less frequently or were considered less important, the skills may have never improved regardless of tenure.

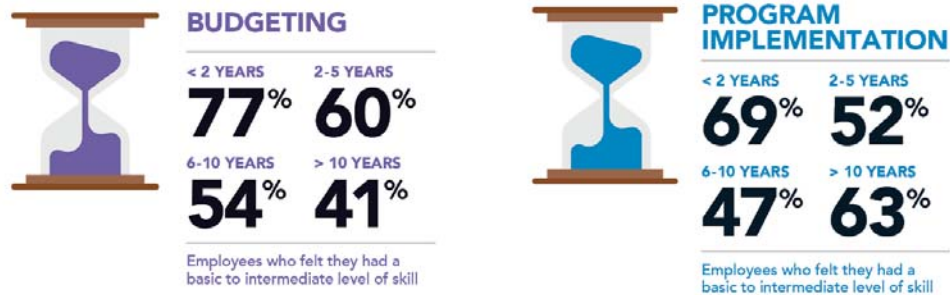
- Promotion/marketing
- Facility operations
- Staff planning
- Evaluation of services
- Event co-ordination
- Scheduling centre resources

Tenured leaders tended to consider skills as more “critical” in general.

Those leaders with two years or less in a position felt more confident in their abilities in promotion/marketing.

Those with less than two years in their role felt less confidence in their budgeting and evaluation skills.

LENGTH OF SERVICE



*Sample sizes for some of these categories are quite small (n<20), interpret with caution.
*Please see the appendices for more detailed information.

INSIGHTS INTO SKILLS NEEDS: URBAN VS RURAL

A skill needs matrix was also developed based on whether the leaders operated their organization in a rural or an urban setting. Most notably, the hypothesis for this study was that urban based organizations would have higher skills levels based on easier access to skills training, networking, synergy with other like-minded organizations and other skills-related opportunities.

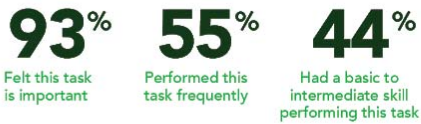
- In eight of the 15 areas evaluated, rural leaders and their urban counterparts considered themselves to be comparably skilled.
- In the other seven areas, there was a notable gap in self-measured skill levels with urban respondents rating themselves higher. The three largest gaps were in program planning, program implementation, and team management skills.

NOTE: The perceived importance and frequency-of-use of various tasks were seen as either more important/frequent in urban settings (program planning and implementation, marketing) or comparable (all others). The one exception was in facility operations, where rural ratings of importance were higher.

RURAL VS. URBAN



PROGRAM PLANNING



PROGRAM IMPLEMENTATION



TEAM MANAGEMENT



COMMUNITY ENGAGEMENT



PROGRAM PLANNING



PROGRAM IMPLEMENTATION



TEAM MANAGEMENT



COMMUNITY ENGAGEMENT



*Please see the appendices for more detailed information.

INSIGHTS INTO SKILLS NEEDS: TEAM SIZE (STAFF AND VOLUNTEERS)

The third skills matrix was developed based on the size of the organization (defined by staffing levels).

- When comparing skills requirements by organizational size, it understandably appears that: as the organization size grows, so does the frequency of skills used, the importance of those skills, and the corresponding skill levels of the leaders and board members.
- Areas where frequency of use was comparable across all org. sizes included:
 - Program implementation, budgeting, scheduling center resources.
- Areas where importance was consistent across organizational sizes included budgeting, community engagement, and planning.
- Areas where skill levels did not appear to strengthen as organizational size increased included facility operations, evaluation of services, and fund development. This could be in part due to increasing skills demands as organizations become larger and more complex.

In the following graphic we show the skills ranked as most important by respondents, defined by organization size.

TEAM SIZE



STAFF SUPERVISION



Employees who felt this was an important part of their job



FUND DEVELOPMENT



Employees who felt this was an important part of their job



COMMUNITY ENGAGEMENT



Employees who felt this was an important part of their job



PROGRAM IMPLEMENTATION



Employees who felt this was an important part of their job



EVALUATION OF SERVICES



Employees who felt this was an important part of their job



BUDGETING



Employees who felt this was an important part of their job

*Please see the appendices for more detailed information.

INSIGHTS INTO PREVAILING ATTITUDES: SKILLS DEVELOPMENT IN THE COMMUNITY SECTOR

In the following word cloud, based on the perspectives of organizational leaders and employees/volunteers, we can see perceptions and prevailing attitudes regarding perceived core competencies. These responses were solicited without using any prompts, and were the top-of-mind skills the respondents believed were required for success.

The purpose of this representation is to understand that if a topic is considered important - but is not currently seen that way by one or both groups - mindsets must change before adaptation can effectively occur.

This informed the competencies in the model and subsequent training recommendations.

Insights:

- Strategic planning is not top of mind as a core/critical skill in the sector;
- Despite the rapid shift globally to digital solutions, neither group widely considers digital/computer/social media skills as a critical skill;
- Similarly, neither group seemed to flag networking/relationship building as an obvious, core skill;
- The leader's group were more focused on financial/accounting as a critical skill than their team members;
- Team members/volunteers were far more tuned-in to the importance of "subject matter knowledge", to be able to operate effectively; and
- When thinking about critical skills for their leaders, team members/volunteers were heavily focused on the "soft side" of skills development. Given they are often the recipient of those abilities, ensuring they are delivered well deserves strong consideration.

Please note the frequency of the responses gathered is directly represented in the size of the word. The higher the frequency of the answer, the larger the word.

Responses from Leaders and Board Members

“If you had to pick only three skills or abilities that are absolutely necessary to your role, what would they be?”
(Word cloud based on frequency of mention in 593 total responses)



- In both groups, “Communications” was most often seen as critical, followed by financial skills and leadership.
- In both groups “Digital/Social” expectations were very low
- Both groups references to strategic “planning” were light

Responses from Everyone Else (Staff and Volunteers)

“If you had to pick only three skills or abilities that are absolutely necessary to your role, what would they be?”
(Word cloud based on frequency of mention in 593 total responses)



- Staff/Volunteers focused far more on the need for “subject knowledge” by their leaders
- In the staff/volunteer group, input focused heavily on a range of “soft skills” (20%+ of all responses)*

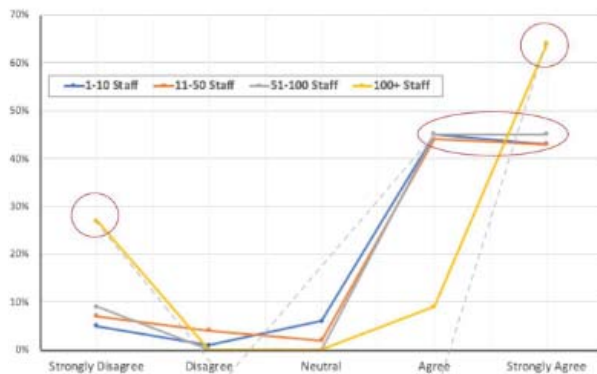
*SOFT SKILLS INCLUDED MULTIPLE MENTIONS OF: Empathy, determination, passion, energy, patience, reliability, courteousness, understanding, diplomacy, courage, guidance, respect, confidence, adaptability, flexibility, honesty, open mindedness, engagement, positivity, commitment, inspiration, responsibility, compassion

Underpinning any audience's willingness to embrace further skills development are their perceptions of the current situation. In the following charts, we can see most leaders in the community sector believe they currently have the skills needed to run successful operations, but many could "be even more effective with additional skills support."

This is further illuminated by the fact that staff/volunteers in many cases have a slightly lower perception of leader competency than the leaders themselves. In the case of the largest organizations, it may be positive to highlight the endorsement that workers provided of their leadership groups.

Responses from Leaders and Board Members

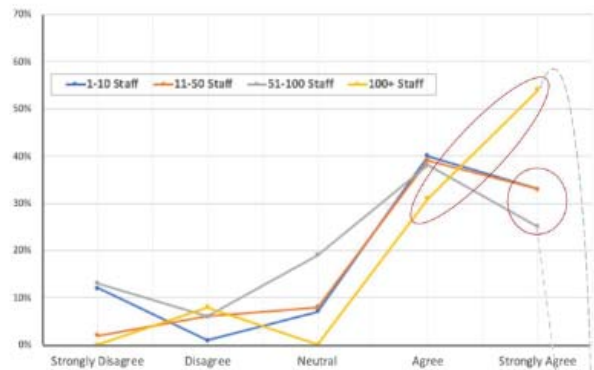
To what extent do you agree with the following statement?
"I feel that I have adequate skills and knowledge to perform in my position"



- Almost 90% of all leaders and board members running operations of 100 staff or less, agree they have ADEQUATE or better skills for the position.
- A significant number of leaders/board members of 100+ staff operations DO NOT agree that they have the skills needed, while the majority believe they are VERY GOOD at what they do.

Responses from All Others (Staff and Volunteers)

To what extent do you agree with the following statement?
"I feel that those in executive, management, or leadership roles in my organization have adequate skills and knowledge to perform in their position"



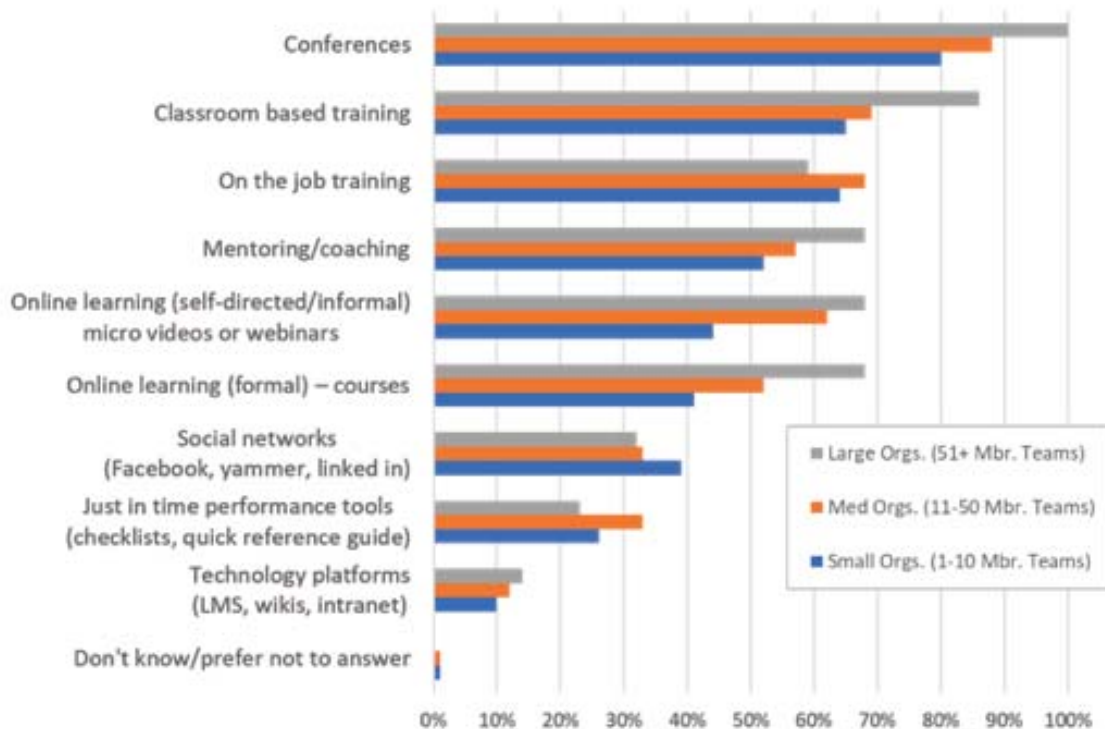
- In operations with 100 staff or less, staff are NOT QUITE as confident about their leaders abilities as their leaders are.
- The exception is in 100+ staff operations, where 85% agree their leaders have the skills needed.

INSIGHTS: MODES OF LEARNING

As part of this research, we endeavored to understand how the current population within the sector had acquired their existing skills. This information would help us better understand how to design any training programs needed, and where there were opportunities for development.

Insights:

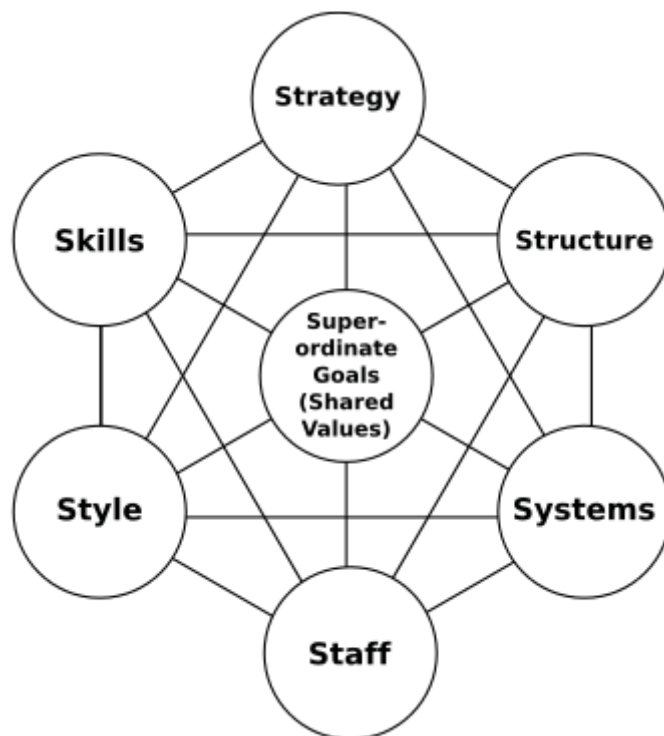
- Conferences are seen universally in the sector as a training resource (and widely used);
- Classroom-based training is most familiar to larger organizations (as their numbers may provide workable economies);
- Larger organizations are beginning to embrace core online learning methods;
- Smaller organizations appear to be lagging in online training;
- Social networks, just-in-time tools, and technology platforms are not yet being used by the majority of organizations for training purposes; and
- There are significant differences in the utilization of various training methods from region to region, but it appears to be somewhat random, and not based on region size or location.



A HOLISTIC APPROACH TO COMPETENCY DEVELOPMENT

Any relevant competency model being developed must be contextualized within several core elements. Foundationally, a competency model must be rooted in stakeholder engagement and research, but it must also be built around the strategy of the sector for which it is being developed.

Here we refer to the McKinsey 7S Framework, a management model based on the theory that for any organization to perform at its best it must have seven essential elements aligned and mutually reinforced.



In the context of the community sector, these seven areas of an organization are divided into hard and soft areas with Strategy, Structure, and Systems categorized as hard, and Style, Staff, Skills, and Shared Values as soft.

7s Factors	
Hard S	Soft S
Strategy	Style
Structure	Staff
Systems	Skills
	Shared Values

The development of Skills is linked to the other six elements, with the understanding that a change in one area requires a change in the others to ensure effective functioning of the system. The process used for this project was not intended as a full McKinsey diagnostic, as that analysis falls well outside the scope of this project. However, we have defined one of McKinsey’s Hard S’s, Strategy, specific to the community sector, to support the development of the leadership competency model.

STRATEGY

In a for-profit business, Strategy is developed to achieve sustained competitive advantage and successfully compete in the market. However, in the context of the community sector, providing high-quality services which enrich, enhance, and support the community is the primary driver rather than profit.

The community sector in Newfoundland and Labrador is in the midst of reframing its value proposition and promoting its inherent rewards both to attract future leaders and to cast light on the critical nature of its work in regard to success and economic development. Preliminary work has been completed on mapping the way forward for the community sector, and ongoing development and coordination of this vision will occur with sector stakeholders. However, for the purpose of this project, we leveraged the strategic direction of the community sector as outlined in the *“Sector Work Plan to Advance the Social and Economic Contribution of Community Organizations in Newfoundland and Labrador”* :

“Together, we will pursue opportunities that strengthen the economic contributions of the community sector and remove barriers that prevent the community sector from reaching its full potential. Our collaborative actions will foster the conditions necessary for vibrant

community organizations that contribute to the economic and social fabric of Newfoundland and Labrador.”¹

To this end, the primary community sector strategic targets, which the skills requirements were built around, are:

- Building capacity of organizations so they are resilient and sustainable;
- Enhancing the ability of community sector organizations to attract, retain and develop a talented workforce – both paid and volunteer;
- Position the community sector as an economic driver;
- Enhance the knowledge of the community sector as a driver of social change; and
- Enhance and create new innovative partnerships, both within the community sector and between the community, private and public sectors.²

ADDITIONAL POINTS OF REFERENCE SPECIFIC TO THE MCKINSEY MODEL

There were several other points of note that directly linked to the McKinsey model which had impacts on the community sector. These insights were formulated primarily through the feedback received during the key informant interviews. This is not meant as a comprehensive listing, but rather a generalized overview of certain trends and challenges taken into consideration when constructing the community sector leadership competency model.

STYLE

Under the McKinsey model, Style represents the way an organization is managed by top-level leaders, how they interact, and what actions they take to get their required tasks completed.

This element was not defined universally for this project as the diversity of leadership across the sector would have been immense and difficult to capture in one pervasive Style. However, based on the feedback received, there was one continually raised element impacting the Style of many leaders: resource scarcity.

Due to limited resources, leaders within this sector often wear multiple hats within their organizations. As such, their time is limited. Compounding this challenge, an increasing number of community organizations are reportedly facing fiscal challenges within Newfoundland and Labrador.

¹ <https://www.gov.nl.ca/thewayforward/files/The-Way-Forward-with-Community.pdf>

² <https://www.gov.nl.ca/thewayforward/files/The-Way-Forward-with-Community.pdf>

With very limited resources and even less time, survival of a community organization often hinges on the leader assuming an operational role, which reduces their available time to fulfill the “visioning role” for the organization. These elements impact the Style of leadership within the sector.

SYSTEMS

Systems as defined under the McKinsey model as the “processes and procedures of an organization/sector which supports daily activities and how decisions are made.”

Some emerging System challenges, identified as having an impact on the sectors ability to respond to change and the new demands being placed on them, include (but are not limited to):

- Accurate workforce information/data;
- Accurate program evaluation data and impacts; and
- Promotion and marketing of the understanding of the role, impact, and opportunities within the community sector.

In addition, within the community sector, available funding for organizations, and the processes required to secure these resources, change in response to government policy directions and priorities.

This System can present a unique challenge and many of the people interviewed indicated they spend a large proportion of their time seeking out contacts in funding agencies, keeping up to date with current policy initiatives and associated project funding, writing proposals and submissions (which were not always successful), and report writing.

The activities required to successfully navigate funding systems are critical to the success of organizations within the community sector, but it should be noted the demands of sourcing, securing and administering funding, places a high demand on the time of organizations and their leaders.

STRUCTURE

In the McKinsey model, Structure is the way businesses/organizations are organized and includes an accountability framework. Community sector organizations are beginning to develop social enterprises, designed to generate a source of funds, as well as provide programming to meet the needs of clients and the community. These

strategic organizational structural changes present unique challenges in regard to skill sets present within the traditional community sector organizations.

Of those surveyed who were undertaking the development of a social enterprise, a large portion were hiring external consultants to assist with this undertaking. Additionally, these new mandates may also cross boundaries with the core mission and values of an organization, and requires a significant, strategic realignment negotiated throughout the leaders of the organization.

CSC NL LEADERSHIP COMPETENCY MODEL

DESCRIPTION

The CSC NL competency model designed for this project includes nine behavioural competencies and three technical competencies.

Behavioural Competencies - Overarching attributes an individual requires to deliver on the mission, vision, and values of their organization's strategic imperatives.

Technical Competencies - The application of knowledge and skills needed to perform effectively in a specific job or group of jobs within an organization.

The competencies presented in this model were identified via research and rigorous stakeholder engagement. They are meant as a starting point for the CSC NL Leadership Model and were created to identify and map key outcomes of the top five training priorities. All training outcomes outlined are designed to support the key behaviours identified.

HOW ARE THE COMPETENCIES PRESENTED

A definition is provided for each competency. Each skill or task is then described in terms of Level of Proficiency or a set of defined behaviours, providing a structured guide enabling the identification, evaluation, and development of the behaviours.

To achieve levels of competence, an individual must be able to perform various tasks or skills at a target proficiency level. The scale is progressive from the lowest level to the highest: Basic, Experienced, and Advanced.

Given the diversity of the community sector, and the varied tasks required by leadership, an individual will self-assess the level at which they will have to function to successfully execute their organizations strategy.

BEHAVIOURAL COMPETENCIES

As previously discussed, Behavioural Competencies are the overarching attributes an individual requires to deliver on the mission, vision, and values of their organization's strategic imperatives.

In this section, we discuss the non-technical competencies: Strategic Thinking, Leading People (both volunteers and staff), achieving Operational Excellence, Business Acumen, Adaptability, Collaboration and Strategic Partnerships, Trends, and Conflict Resolution.

Under each of these categories we describe the relevance of the skill to the community sector organizations, as well as how it relates to the research carried out. We'll discuss how each of these skills connect to the strategic priorities of the sector, and provide baselines for Basic, Experienced, and Advanced Skill Levels for each of the competencies.

1. STRATEGIC THINKING

Strategic Thinking, whether for a business or a community sector organization, is critical to success. Strategic Thinking spans financial management, human resources development, stakeholder co-ordination and development, emerging opportunities, etc., and allows the connecting of a long-term vision to the work that occurs daily within an organization.

As mentioned in the previous section, due to many environmental factors, looking beyond their present operational reality can be problematic for many leaders within the sector.

1. Supporting Feedback on the Importance of this Competency:

- Nearly 90% of survey respondents indicated they felt strategic planning was "important" or "very important." However, more than 60% of respondents indicated they performed this task infrequently.
- More than 80% of survey respondents felt staff planning was "important" or "very important" but 58% of respondents performed this task infrequently.
- It should be noted and recognized that leaders within the sector had a greater confidence in their abilities specific to "program planning," which requires a high level of strategic thought.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable; and
- Positioning organizations as an economic engine and as a driver of social change.

BASIC SKILL LEVELS CAN:

- Understand organization's strategic direction and activities required to enact it.
- Distinguish between critical and irrelevant pieces of information.
- Propose alternate plans.
- Analyze and understand operational goals and correlate them to organizational strategies, while delegating the corresponding activities to appropriate team members to achieve these goals.
- Effectively collaborate with stakeholders to initiate strategic goals.

EXPERIENCED SKILL LEVELS CAN:

- Develop and establish broad-scale, longer-term objectives, goals or projects, and frames decisions in the context of current and future strategic goals.
- Identify gaps in information, apply reasoning and existing knowledge to make solid assumptions, for continuing analysis.
- Continuously increase community sector knowledge, integrating it in daily decision making.
- Identify and create opportunities to initiate new partnerships to facilitate the achievement of strategic goals within the organization.

ADVANCED SKILL LEVELS CAN:

- Create organizational strategy establishing short-, medium- and long-term objectives, using data to continuously refine objectives.
- Formally evaluate effectiveness of strategic goals.
- Redesign the organizational structure and operations to increase performance, and meet short- and long-term objectives.
- Involve, broaden, and link diverse stakeholder relationships, creating a common vision of success for the organization, community, and sector.

2. PERSONNEL - LEADING PEOPLE AND BUILDING TEAMS OF THE FUTURE

Many leaders within the community sector have the responsibility to recruit, lead, develop, and motivate teams of people. However, due to the contraction of the population in Newfoundland and Labrador and the competition for talent from other industries, there is a shrinking pool of potential board members, staff members, volunteers, and donors, especially in rural areas. In addition, the development of teams, and the planning and grooming of leadership within this sector is critical. For this competency we have segmented its development into two sub-competencies: A: Recruitment and B: Employee/Team Management and Development.

Supporting Feedback on the Importance of this Competency:

- More than 80% of respondents rank staff planning and supervision as “important” or “very important,” with more than 45% of organizations doing it infrequently.
- More than 90% of respondents ranked team management as “important” or “very important,” with 44% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Enhancing the ability of community sector organizations to attract, retain and develop a talented workforce – both paid and volunteer;
- Position the community sector as an economic driver; and
- The capacity of organizations to be resilient and sustainable.

A. RECRUITMENT

BASIC SKILL LEVELS CAN:

- Understand positions and roles offered and key skills required for success.
- Understand and communicate the organization’s value proposition to potential candidates.
- Use a general awareness of labour market, availability of skills required within the local talent pool.
- Understand and use candidate sourcing channels and how to leverage it in sourcing candidates.
- Use of data and resources to assess candidate skill levels and organizational fit.

EXPERIENCED SKILL LEVELS CAN

- Understand local labour market, to identify core competencies across various disciplines.
- Understand job needs at the technical and results level.
- Link, market, and communicate open positions in relation to organizational strategy.
- Use advanced social media and marketing tools to source candidates.
- Use a defined process to assess candidate skill levels and organizational fit.

ADVANCED SKILL LEVELS CAN:

- Understand local labour market, to identify alternative talent markets to source appropriate candidates.
- Understand the job needs at the technical and results level, and can structure positions creatively to access a broader audience of potential recruits (virtual workers/volunteers, job sharing between multiple candidates, etc.)
- Create robust, insightful sourcing and branding plans to attract potential candidates and/or candidate pools.
- Expert communicator, able to link and market open positions in relation to organizational, community, and societal impacts.
- Development of a mature, data-driven process to recruit, interview, and assess potential candidates.
- Tracking best practices and lessons learned throughout the recruitment process, using information and supporting data to continuously refine the full-cycle recruitment process.

B. TEAM DEVELOPMENT AND MANAGEMENT

BASIC SKILL LEVELS CAN:

- Understand skills within the organization, assigning tasks and projects, matching people and skills.
- Identify opportunities, challenging and encouraging the development of people within their organization.
- Identify individual and team skills gaps, working with individuals or teams to remediate gaps through various means.
- Understand diversity, promoting it organizationally.
- Facilitate communication, aligning outcomes with organizational goals.
- Recognize conflict, quickly addressing and remedying conflict.

- Respect for ideas and contributions of others, giving credit and rewards accordingly.

EXPERIENCED SKILL LEVELS CAN:

- Create high-functioning teams, based on complementary skills.
- Coach and provide growth opportunities through new team assignments and sharing expertise between individuals, teams, or organizations.
- Innovatively approach to build, support, and maintain a diverse workforce.
- Facilitate communication between individuals, teams, and other organizations or partners.
- Resolve obstacles, equipping team members with skills to address and resolve conflict.

ADVANCED SKILL LEVELS CAN:

- Develop skills strategies for succession planning, supporting future mandates of the organization.
- Develop, foster, and mentor leadership opportunities throughout the organization.
- Ensure people are continuously developed, receiving regular feedback, career planning and development opportunities.
- Ensure HR planning aligned with organizational strategic planning.
- Design and implement structural supports enhancing diversity and individual and team performance.
- Design and implement structural supports facilitating continuous learning and knowledge exchange.
- Ensure and leverage various channels for sharing resources and knowledge throughout the organization and community.
- Create a learning culture where experimentation is encouraged, valued, and rewarded.

3. LEADING PEOPLE AND BUILDING TEAMS OF THE FUTURE (VOLUNTEERS)

The main behaviours required to recruit and manage a team of paid employees translates into management of volunteers; however, it was communicated by stakeholders that there are additional behaviours that are important to engage volunteers. These competencies relate to leaders energizing and creating a sense of direction and purpose for volunteer contributions, creating a compelling vision of the future of the organization, and the benefits it will bring to the community.

BASIC SKILL LEVELS CAN:

- Recognize volunteers' achievements, knowledge, and capabilities.
- Demonstrate openness to volunteers, embracing input and opinions, and including them in the decision-making process.

EXPERIENCED SKILL LEVELS CAN:

- Communicate a collective purpose to volunteers and create a clear line of sight to the organization, and the impact it has on the community.
- Reward volunteer contributions by profiling individual and group accomplishments and talents across different functions.

ADVANCED SKILL LEVELS CAN:

- Generate excitement, enthusiasm, and commitment in volunteers, translating the organization's vision, mission, and values into relevant terms to work being performed.
- Create leadership positions for volunteers.

4. OPERATIONAL EXCELLENCE

Overseeing day-to-day operations of organizations within the community sector is a key competency required by leaders. This competency involves the effective alignment of people, processes, structures, and technology to run the operations of an organization. This competency includes the behavioural attributes for day-to-day operations, and program planning and execution.

Supporting Feedback on the Importance of this Competency:

- Nearly 80% of respondents ranked operational planning as “important” and “very important” with 54% of respondents doing it infrequently.
- More than 85% of respondents ranked program implementation as “important” or “very important” with 50% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- The ability of community sector organizations to attract, retain, and develop a talented workforce – both paid and volunteer; and

- The ability of the community sector to promote and position itself as an employer of choice, as an economic engine, and as a driver of social change.

BASIC SKILL LEVELS CAN:

- Understand organization's strategic priorities and operational details.
- Assess and allot optimum mix of resources, achieving operational priorities, and program implementation.
- Accurately assess the required operational and program implementation procedures with economic impacts.
- Understand business management to make decisions.

EXPERIENCED SKILL LEVELS CAN:

- Continuously assesses and restructure processes to achieve enhanced productivity, and operational and program excellence.
- Create an operational and/or program implementation plan, and establish metrics to measure the return on investment and impacts of activities.
- Ensure employees/volunteers have managerial and leadership processes to operate productively.

ADVANCED SKILL LEVELS CAN:

- Anticipate and adapt operational and/or program implementation priorities to the strategic organizational goals.
- Provide employees and volunteers the reasoning and knowledge they need to align their mindsets and behaviors to drive operational excellence.
- Create governance structure to facilitate the monitoring, reporting, and benchmarking of progress regarding achieving operational and/or program implementation targets.

5. BUSINESS ACUMEN

Business acumen is understanding how a business or organization achieves its goals and objectives. It includes an understanding of an organization's value proposition to stakeholders, profitability, and organizational value. It also includes an understanding and awareness of how to think about, and successfully make the right business decisions, to ensure the economic success of an organization.

There are numerous competencies that contain components of business acumen contained throughout this model including: financial planning, market awareness, operations, and strategic planning.

There is an increasing need to run community sector organizations with the same principles of a for-profit business to ensure organizational sustainability. There will also be an increased need for this competency with the rise of social enterprise within the community sector.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- Position the community sector as an economic driver; and
- Enhance and create new innovative partnerships, both within the community sector and between the community, private, and public sectors.

BASIC SKILL LEVELS CAN:

- Create and/or monitor a business plan.
- Understand the core activities required to establish and effectively operate a business.
- Understand how to read a profit and loss statement, balance sheet, and cash flow statement.
- Understand the local industry ecosystem and market.
- Leverage industry data to inform decision making process.
- Create basic marketing strategy.

EXPERIENCED SKILL LEVELS CAN:

- Create a business plan with strategic long-term objectives.
- Use sound business judgment to assess market opportunity and adjust strategic directions of the business.
- Predict business outcomes of strategic adjustments from both customer and competitive perspectives.
- Continuously gather and analyze industry data to refine products, services and strategic directions.
- Develop marketing messaging and utilize a variety of channels to push messaging out to customers.

ADVANCED SKILL LEVELS CAN:

- Create a long-term strategic plan and continuously monitor this plan against the core objectives of a business plan.
- Leverage information and tools to reduce operational cost and refine organizational processes.
- Develop a comprehensive marketing plan with short-, medium- and long-term targets.
- Understand and use a variety of platforms to push messaging out to customers.
- Create data infrastructure to continuously gather metrics to inform decision making processes.
- Align internal systems to support execution of strategy based on customer needs and segments.
- Understand current and possible future trends, policies, practices, innovations, and information affecting the organization.

6. ADAPTABILITY

In a world of rapid change and limited resources, leaders within the community sector must demonstrate a positive attitude, resilience, and openness to changes in their organizations and sector.

They must also be able to adapt their approach as the requirements of a situation change, be comfortable in ambiguous situations, and be able to work effectively within a variety of situations and with a diverse group of individuals.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- The ability of community sector organizations to attract, retain and develop a talented workforce – both paid and volunteer;
- Position the community sector as an economic driver; and
- Enhance and create new innovative partnerships, both within the community sector and between the community, private, and public sectors.

BASIC SKILL LEVELS CAN:

- Demonstrate flexibility when changes occur in policies, procedures, culture, situations, and work assignments.
- Integrate input from staff and stakeholders to adjust project plans or strategic organizational directions.

- Assign appropriate people and skills to manage disruption.
- Use available data to support and manage disruption.
- Accept and consider new ideas, procedures, or processes to address a situation.
- Work with diverse stakeholders and people, and can modify own work behaviors to accommodate shifts in the work environment.

EXPERIENCED SKILL LEVELS CAN:

- Support and seek opportunities for change, which improve established processes.
- Assess feedback from a diverse range of resources for consideration, while implementing change.
- Continuously push limits to formulate creative and innovative responses to disruption and change.
- Demonstrate resilience in the face of change and disruption, viewing both positive and negative inputs as productive in creating process improvement.

ADVANCED SKILL LEVELS CAN:

- Anticipate change, making significant or long-term adaptations in organization in response to the needs of the situation.
- Evaluate alternatives and respond quickly and effectively to unexpected and rapidly changing conditions.
- Map strategic directions in response to disruption within highly ambiguous information and situations.
- Encourages and supports disruption when organizationally advantageous.

7. COLLABORATION AND STRATEGIC PARTNERING

To ensure organizational growth and effectiveness, strategic partnerships were identified as essential within the community sector. While conducting the key informant interviews, it also became apparent many of the leaders within the sector rely heavily on their ability to partner effectively with the community, organizations, and other sectors.

Supporting Feedback on the Importance of this Competency:

- Approximately 90% of respondents ranked community engagement as “important” or “very important” with 40% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;

- Position the community sector as an economic driver;
- Enhance the knowledge of the community sector as a driver of social change; and
- Enhance and create new innovative partnerships, both within the community sector and between the community, private, and public sectors.

BASIC SKILL LEVELS CAN:

- Understand how key stakeholders interact within the sector.
- Understand key sector issues so they can capitalize on strategic partnering.
- Identify key players, leaders, and trendsetters within the community, sector, and other industries.
- Collect and analyze relevant data regarding potential strategic partners.

EXPERIENCED SKILL LEVELS CAN:

- Communicate organizational value proposition to the community, sector, and other industries.
- Track sector developments, affecting organization programs, strategic planning, and partnering opportunities.
- Reach out to and collaborate with other community, sector and industry leaders.

ADVANCED SKILL LEVELS CAN:

- Speak as an expert in community sector and future strategic directions.
- Understand community sector players, partners, and relationships, affecting their organizations operations and strategic plans.
- Continuously formulate and adjust strategic directions and partnerships based on sector data and intelligence.
- Identify critical issues within the sector to leverage partnering opportunities to address them.

8. TRENDS IN THE COMMUNITY SECTOR

It is becoming more important for leaders within the community sector to have a complete perspective of the "big picture" of the sector provincially, nationally and internationally. This includes a thorough understanding of all the issues related to the sector and the forces and factors impacting it. This competency is used in every other competency within this model.

Supporting Feedback on the Importance of this Competency:

- About 60% of respondents ranked research on goods and services as “important” or “very important” with 84% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- Enhancing the ability of community sector organizations to attract, retain and develop a talented workforce – both paid and volunteer;
- Position the community sector as an economic driver; and
- Enhance the knowledge of the community sector as a driver of social change.

BASIC SKILL LEVELS CAN:

- Demonstrate an awareness of past and present trends that have influenced practices in the community sector.

EXPERIENCED SKILL LEVELS CAN:

- Use data to monitor emerging trends and issues with potential to influence practices in the community sector.
- Plan, implement, and evaluate new programs and services, addressing emerging trends and issues at the organizational level.

ADVANCED SKILL LEVELS CAN:

- Evaluate emerging trends and execute implementation, ensuring timely and relevant information and services to the organization.
- Provide leadership to employees/volunteers, presenting information on emerging trends, using data driven observations and research.

9. CONFLICT RESOLUTION

Community sector leaders must balance the needs of a diverse group of stakeholders. Having the ability to help others through emotional or tense situations, tactfully being able to resolve disagreements amongst individuals and teams, and facilitating enhanced communication is critically important in any organization, but especially in the community sector.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- The ability of community sector organizations to attract, retain, and develop a talented workforce – both paid and volunteer.

BASIC SKILL LEVELS CAN:

- Identify relationships in various situations.
- Analyze the pros and cons of an action and its impacts.
- Identify and weigh relevant factors of a situation, drawing sound, logical conclusions.
- Identify risk factors and their impacts.

EXPERIENCED SKILL LEVELS CAN:

- Assess the perspectives of individuals, judging personal strengths and weaknesses, as well as the lens through which they're provided, and consider those judgements to make effective decisions.
- Analyze multiple causal relationships and their connections to one another.
- Analyze complex, changing circumstances and adjust to avoid obstacles and achieve deadlines.
- Synthesizes information from diverse sources to achieve win-win solutions.

ADVANCED SKILL LEVELS CAN:

- Identify multiple solutions and evaluate each by their strengths and weaknesses against outcomes.
- Evaluate and interpret complex situations, and formulate a complete and comprehensive response.
- Use complex data to further define challenges and increase situational awareness.
- Use complex analytical techniques to integrate and architect thinking into an appropriate framework.

TECHNICAL COMPETENCIES

As previously discussed, Technical Competencies are the application of knowledge and skills needed to perform effectively in a specific job or group of jobs within an organization.

In this section we discuss the harder skills: Strategic Financial Management and Evaluation.

Under each of these categories we describe the relevance of the skill to the community sector organizations, as well as how it relates to the research carried out. We'll discuss how each of these skills connect to the strategic priorities of the sector, and provide baselines for Basic, Experienced, and Advanced Skill Levels for each of the competencies.

1. STRATEGIC FINANCIAL MANAGEMENT

Within the community sector, a leader must understand the rules, policies, regulations, and procedures for financial administration as they apply to their organization. This requires a solid understanding of their organization's assets and investments; management procedures, like financial authority level and approval process; as well as financial accounting procedures, budgeting, projecting, financial auditing, and more. They must also be able to apply the procedures required to safeguard and use financial resources effectively and economically.

Supporting Feedback on the Importance of this Competency:

- In total, 95% of respondents ranked accounting/financial management as "important" or "very important" with 44% of respondents doing it infrequently.
- The vast majority (94%) of respondents ranked budgeting as "important" or "very important" with 41% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- Position the community sector as an economic driver; and
- Enhancing the ability of community sector organizations to attract, retain, and develop a talented workforce – both paid and volunteer.

BASIC SKILL LEVELS CAN:

- Monitor program/project expenditures and individual expenses for reporting purposes.
- Understand how to read, interpret, and use budgets and projections.
- Update budgets and projections based on data and program monitoring.
- Identify wasteful financial practices and opportunities for greater efficiencies.

EXPERIENCED SKILL LEVELS CAN:

- Ensure adequate internal controls over organizational financial assets, investments, liabilities, revenues, and expenditures.
- Ensure compliance with legislation, policies, and practices for appropriate and effective use of financial resources.
- Act on audit, evaluation, and other objective financial performance information.
- Set up and manage income and expenditure monitoring systems; keeping the systems under close review and making improvements where relevant.
- Take a lead role in preparing budgets and forecasts for projects and initiatives.

ADVANCED SKILL LEVELS CAN:

- Understand strategic context for current fiscal policy, procedures, practices, systems, and accountability.
- Ensure partner organizations, agencies, or governments understand an organization's complex fiscal issues.
- Ensure frameworks are in place for sound financial planning, management, control, and reporting.
- Ensure processes and infrastructure are in place to provide stakeholders with integrated financial and non-financial performance information, a mature approach to risk management and appropriate control systems.

2. EVALUATION

Across all organizations - regardless of budgetary size - evaluation of programs and services was consistently rated as one of the top tasks for organizations. Technical evaluation skills are fundamental to ensuring high-quality evaluations and confidently using their results informing program and policy decisions.

Within the community sector, the use of Theories of Change³ and Logic Models⁴ are effective tools to evaluate programming, people, and strategies. Specifically, Theories of Change helps define long-term goals, mapping backwards to achieve the desired outcomes, while Logic Models allow groups to plan visually, taking all possible outcomes into account. These tools are invaluable to determining the value of programming, planning for events and funding, and for building sustainable social change.

Supporting Feedback on the Importance of this Competency:

Nearly 80% of respondents ranked evaluation as “important” or “very important” with 66% of respondents doing it infrequently.

Alignment with Strategic Priorities of the Sector:

- Building capacity of organizations so they are resilient and sustainable;
- Position the community sector as an economic driver; and
- Enhance the knowledge of the community sector as a driver of social change.

BASIC SKILL LEVELS CAN:

- Identify evaluation needs.
- Facilitate the development of evaluation questions.
- Understand knowledge of evaluation design.
- Understand a range of evaluation data collection and analysis methods.

³ The innovation of Theory of Change lies (1) in making the distinction between desired and actual outcomes and (2) in requiring stakeholders to model their desired outcomes before they decide on forms of intervention to achieve those outcomes.

⁴ Logic models are theories, evidence, assumptions, and beliefs which support the hypothesis of the chain of causes and effects. Logic model usually take form in a graphical depiction of the "if-then" relationships.

EXPERIENCED SKILL LEVELS CAN:

- Understand the various types of Theories of Change and Logic Models.
- Develop clear and focused evaluation questions.
- Use elaborate evaluation designs for moderately complex evaluations and modify existing designs to fit the context.
- Apply a range of evaluation data collection and analysis methods.
- Recognize the importance of multiple and mixed methods of evaluations.

ADVANCED SKILL LEVELS CAN:

- Can understand complex evaluation design.
- Ensure appropriate evaluation data collection and analysis methods are used.
- Prioritize and focus evaluation questions.
- Interpret a range of evaluation methods and approaches, both quantitative and qualitative.

COMPETENCY BASED TRAINING RECOMMENDATIONS – CSC NL TRAINING SERIES

OVERVIEW

The following section outlines the key training recommendations identified for priority development within the community sector based on the research completed. The outcomes contained within each outline were built around their correlating competency contained within the preceding model. Some of the activities and outcomes were also identified via a scan of existing training available globally specific to the community sector.

COMPETENCY – STRATEGIC PLANNING

Community sector leaders strive to build and lead organizations which serve their communities, but these organizations must also be sustainable, despite an environment with shrinking resources and rapid change. In order to achieve this lofty goal, strategic planning is required.

This training program will provide the participants with an advanced strategic leadership model and framework, as well as a process for turning strategic planning into improved performance and results.

Strategic Planning Overview

- Identify questions strategic planning must address.
- Identify the analyses typically incorporated in strategic planning.
- Describe how these questions and analyses can be organized into a structured strategic planning process.

Assessing the External Environment

- Distinguish the various factors that impact the organization.
- Identify market trends that are shaping the landscape and how they will affect the organization and the strategy

Assessing the Internal Environment

- Components of an internal assessment; review of top programs and services, market research, resource review, and financial performance review.
- Appreciate the importance of organizational culture, mission, and vision in an internal assessment.

Strategic Decision Making

- Identify the role of data and insight in strategic planning.
- Describe how to conduct a SWOT analysis for your organization.
- Understand how to use a SWOT analysis to choose your strategic imperatives.
- Determine performance measures

Building A Strategic Action Plan

- Begin developing your own strategic action plan.

Executing A Strategic Action Plan

- Learn how a leaders build commitment through avenues of communication throughout the execution process.
- Identify ways to align the organization toward a single purpose.

Evaluation

- Why establishing an extensive evaluation plan is critical to the success of any strategic plan?

COMPETENCY – FINANCIAL MANAGEMENT

Regardless of the organization, money and mission are intertwined. To provide services, community sector organizations need financial resources and tools necessary to strengthen the organization. This training program will introduce the tools leaders within the community sector need to build financial capacity and move the organization forward.

Introduction to Community Sector Finance

- Identify current issues in community sector finance including the general economy, funding threats and opportunities, and greater competition for limited resources.

Finance and Mission

- How to align financial planning with strategy.
- Understand how to use financial information to make important decisions that move the organization toward mission attainment.
- Financial modeling and how to develop a long-term financial planning tool.

Financial Planning and Budget Development

- Learning the process of preparing a budget.
- Understand the techniques used to monitor a budget.
- Understand organizational capital structure.
- How to balance reserves, debt, and acquisition of new capital to fund expenditures.

Managing Risk

- Tools for identifying and managing financial risk.
- Fraud, theft, and reputational risk to organizations and the community sector as a whole.
- Protecting financial resources through proper use of internal controls.
- Understanding reporting requirements to ensure legal obligations and transparency.

COMPETENCY – EVALUATION

Increasingly, evaluation is recognized as an important tool to improve programs and be accountable to the range of community sector stakeholders.

Evaluation skills are required to develop and implement effective programs in response to identified needs, to demonstrate accountability, and to acquire the information needed for ongoing program improvement and continued funding.

This course presents the key principles, concepts, and methods required for the evaluation of services, programs, partnerships, and initiatives in the community sector.

Evaluation Overview

- Key evaluation types and approaches.
- The roles of internal and external evaluation.
- Key evaluation design considerations.
- Using evaluation models to inform strategic decision making and planning.
- The role of core competencies in evaluation.

Planning an Evaluation

- Planning an evaluation plan - key components of an evaluation plan
- What is a program logic model and when is it helpful?
- How to facilitate a program logic mapping session
- Budgeting for an evaluation

Data and Data Analysis

- Data collection/Major methods of data collection.
- The role of mixed methods in evaluation – strategies to integrate qualitative and quantitative methods.
- Data analysis principles.

Results Dissemination

- How to create a dissemination plan.
- How to set dissemination targets using various techniques, specific to identified audiences.
- How to evaluate the effectiveness of your evaluation dissemination.

COMPETENCY – PROGRAM IMPLEMENTATION

A well-designed program and implementation strategy - which fits the needs of its target population - is well positioned to achieve its desired outcomes, and address and overcome challenges in its path.

This training course will outline the key activities involved in the design, delivery, evaluation, and monitoring of program design and implementation.

Identifying the Needs of the Community

- How to conduct a needs program needs analysis - define the program target populations, their needs, and the most effective process to deliver program goals.

Creating an Effective Implementation Plan

- How to set realistic and measurable objectives for your program.
- How to assess, align, and assign organizational resources to activities involved in program implementation.
- Developing a program value proposition and marketing communication plan.
- Setting program targets and timelines.

Creating an Effective Evaluation Framework and Continuous Improvement Monitoring

- How to develop an evaluation plan and materials to determine achievement of program objectives.
- How to use evaluation results and data to incorporate continuous quality improvement strategies into your implementation plan.

COMPETENCY - STRATEGIC PARTNERING

Collaboration is critical in creating new opportunities within the community sector and ensuring sustainability. Cultivating and nurturing partnership opportunities requires skills and resources and an understanding of the strategic purpose and value of partnerships and alliances have in the community sector.

This training course will focus on the understanding of the strategic foundation of partnerships, its required implementation and governance structure, and the dynamics of the collaborative process. The program will explore the challenges in selecting, negotiating, and managing alliances provincially, nationally, and internationally.

Strategic Planning

- Understanding the value alliances can make in developing and implementing strategy.
- Learning to design effective high-performing alliances - creating specific frameworks in partner selection, network development, and alliance design

Communicating with Your Partners

- Navigating and leveraging cultural differences across organizations and industries.
- Building skills successfully to address cross industry cultural differences to build mutual trust and capture value.
- Developing management approaches for anticipating and resolving tensions and conflicts at every stage in the collaborative process.
- How to establish infrastructure to facilitate continuous communication with your partners.

Marketing Your Organization

- How to create a value proposition for your organization.
- How to develop methods for effectively sharing knowledge with partners - understanding what knowledge to share, and how.

SOLUTIONS FOR LESS FREQUENTLY USED SKILLS

Throughout the skills assessment, it was noted some skills were critical, but were only required occasionally. The challenge in these cases is two-fold:

1. Without adequate application and repetition to sustain the knowledge learned, retaining a skill is difficult; and
2. If the skills are required infrequently, then deploying the resources (time and money for training) required to upskill an individual within every organization may be counterproductive.

The following skills areas have been flagged for more innovative training solutions, like providing access to a subject matter resource or expert through the CSC NL.

- Advertising and promotion
- Market research
- Resource scheduling skills (i.e. through new software solutions)
- Event co-ordination (i.e. through an expert or software solutions)

To apply this solution provincially, a web-based approach may be warranted, whereby, similar to telemedicine, online-program delivery can be developed so all groups can access the same resources, as needed.

GOING DIGITAL

There is no denying that technology has created change amongst organizational systems, relationships, and workforces, and the likelihood it will continue to do so is a foregone conclusion.

Different sectors are at different levels of digital adoption and, as demonstrated in the feedback received from this project, right now, going digital within the community sector is currently not a top priority. However, in the key informant interviews, many of the interviewees indicated certain digital tools would be of great benefit to their organizations. Many of the digital tools mentioned were in relation to financial management, promotion, and marketing.

A Digital Culture

In the future, the need to create and cultivate a digital culture within the community sector will probably increase but to begin, it is important to ensure leaders within the sector are informed, engaged, and most importantly, empowered to start cultivating a digital mindset. That process starts with a basic awareness of digital culture and what it could mean for their organizations.

To this end, it may be of benefit to offer an introductory training program for digital awareness, the purpose of which would be providing individuals with the skills required to develop their understanding of the digital space and how to access the right information to develop their organizations. Key concepts may include: an introduction to the digital world, digital industry trends, introduction to digital financial management, and introduction to digital marketing.

CONCLUSION

The Community Sector Council Newfoundland and Labrador (CSC NL) is a diverse, exciting group of organizations with the potential to grow and sustain themselves in the long term.

In both rural and urban Newfoundland and Labrador, the community sector represents a significant component of our communities, and should be treated as such. While the community sector has many leadership skills already in place, it will benefit from training and enhanced competencies to continue to meet its mission of citizen engagement, promoting integration of social and economic development, and providing leadership in shaping public policies.

This seven-phase study by Training Works on behalf of the CSC NL has resulted in a Leadership Competency Model which will help the community sector and the populations it serves to thrive in the future.

APPENDIX A: Summary Chart

Leadership Related Tasks	Criticality (Imp/Very Imp)	Frequency (Freq/Very Freq)	Skills Gap (Basic/Intermediate)	Relevance of Core Business Skills	Criticality (Imp/Very Imp)	Frequency (Freq/Very Freq)	Skills Gap (Basic/Intermediate)
Personel							
Staff Planning	81%	42%	15/43%				
Staff Supervision	81%	53%	13/38%				
Team Management	91%	56%	14/45%				
Operations							
Facility Operations	77%	46%	28/43%	Obtaining capital/cash flow for Ops and salaries	90%	49%	26/40%
Scheduling Centre Resources	69%	30%	26/49%				
Event Coordination	75%	35%	19/40%				
Programming							
Program Planning	88%	48%	16/36%	Marketing Research on Need for Goods/Services	60%	16%	43/46%
Program Implementation	86%	50%	17/42%				
Evaluation of Services	78%	34%	26/44%	Evaluation of Social Impacts/Success	77%	29%	34/47%
Outreach							
Dealing with Community Members	92%	69%	12/44%				
Community Engagement	90%	60%	18/41%				
Promotion / Marketing	75%	35%	32/44%	Advertising and Promotion	77%	35%	31/50%
Planning							
Budgeting	94%	59%	21/33%	Accounting/Financial Management	95%	64%	21/41%
Long Term Planning	89%	39%	23/46%	Creation of a business Plan/Model	67%	18%	27/51%
Fund Development	83%	38%	27/46%	Investment Planning	47%	10%	51/33%
				Securing Start-Up Capital	60%	17%	49/35%

KEY		Flagged: Priority for Skills Development
		Flagged: Skills Development Required
		No General Skills Needs Identified at this time
		Criticality rated Imp/Very Imp X 90%+.
		Criticality rated Imp/Very Imp X 80-89%.
		Criticality rated Imp/Very Imp X 70-79%
		Criticality rated Imp/Very Imp X <70%
		Frequency of Activity rated Freq/Very Freq X 60%+
		Frequency of Activity rated Freq/Very Freq X 50-59%
		Frequency of Activity rated Freq/Very Freq X 40-49%
		Frequency of Activity rated Freq/Very Freq X <40%
		Current skills level rated at Basic or Intermediate by over 70%
		Current skills level rated at Basic or Intermediate by 60-69% (or over 20% rated their skill level as Basic)
		Current skills level rated at Basic or Intermediate by <60%

APPENDIX B: Length of Service

		< 2 years	2-5 years	6-10 years	> 10 years
staff supervision	Frequency (F, VF)	42.9%	51.0%	51.1%	57.3%
	Criticality (I, VI)	79.3%	73.5%	84.8%	83.2%
	Skill Level (B/I)	52.0%	64.0%	45.0%	48.0%
staff planning	Frequency (F, VF)	34.5%	40.0%	34.0%	47.4%
	Criticality (I, VI)	69.0%	83.7%	84.8%	83.0%
	Skill Level (B/I)	62.0%	59.0%	52.0%	59.0%
program planning	Frequency (F, VF)	52.9%	47.3%	42.9%	50.0%
	Criticality (I, VI)	85.7%	89.1%	89.8%	85.7%
	Skill Level (B/I)	61.0%	55.0%	51.0%	46.0%
program implementation	Frequency (F, VF)	54.3%	44.4%	46.8%	51.5%
	Criticality (I, VI)	77.1%	88.9%	89.6%	84.7%
	Skill Level (B/I)	69.0%	52.0%	47.0%	63.0%
promotion/marketing	Frequency (F, VF)	38.9%	32.7%	36.7%	34.4%
	Criticality (I, VI)	64.9%	67.3%	77.6%	80.4%
	Skill Level (B/I)	65.0%	80.0%	82.0%	75.0%
facility operations	Frequency (F, VF)	48.3%	45.7%	38.6%	49.4%
	Criticality (I, VI)	75.9%	68.0%	76.1%	82.4%
	Skill Level (B/I)	64.0%	72.0%	71.0%	72.0%
evaluation of services	Frequency (F, VF)	28.6%	32.1%	31.3%	35.8%
	Criticality (I, VI)	74.3%	71.9%	75.0%	84.4%
	Skill Level (B/I)	80.0%	65.0%	73.0%	68.0%
event coordination	Frequency (F, VF)	43.2%	34.5%	27.5%	36.1%
	Criticality (I, VI)	73.0%	78.9%	72.5%	74.5%
	Skill Level (B/I)	60.0%	67.0%	67.0%	49.0%
budgeting	Frequency (F, VF)	38.9%	61.0%	64.6%	60.6%
	Criticality (I, VI)	80.6%	94.8%	95.9%	98.0%
	Skill Level (B/I)	77.0%	60.0%	54.0%	41.0%

fund development	Frequency (F, VF)	27.3%	52.9%	32.6%	36.6%
	Criticality (I, VI)	84.4%	77.4%	79.2%	88.2%
	Skill Level (B/I)	81.0%	74.0%	77.0%	69.0%
dealing with community members	Frequency (F, VF)	63.9%	62.7%	70.6%	71.6%
	Criticality (I, VI)	97.2%	91.5%	94.1%	89.2%
	Skill Level (B/I)	56.0%	58.0%	55.0%	53.0%
community engagement	Frequency (F, VF)	56.8%	62.7%	62.0%	56.9%
	Criticality (I, VI)	91.9%	89.8%	92.0%	88.2%
	Skill Level (B/I)	62.0%	56.0%	60.0%	59.0%
strategy/long term planning	Frequency (F, VF)	36.1%	41.1%	46.0%	35.6%
	Criticality (I, VI)	88.9%	89.3%	90.2%	88.1%
	Skill Level (B/I)	67.0%	62.0%	72.0%	73.0%
scheduling centre resources	Frequency (F, VF)	21.4%	27.9%	24.4%	35.3%
	Criticality (I, VI)	60.7%	65.1%	76.7%	67.8%
	Skill Level (B/I)	81.0%	86.0%	63.0%	74.0%
team management	Frequency (F, VF)	48.5%	44.4%	52.1%	66.3%
	Criticality (I, VI)	90.6%	89.1%	91.7%	89.6%
	Skill Level (B/I)	67.0%	63.0%	62.0%	52.0%

*Do not use/do not have and other non-responses were excluded where applicable.

APPENDIX C: Rural Vs. Urban

		Urban	Rural
staff supervision	Frequency (F, VF)	55%	51%
	Criticality (I, VI)	82%	80%
	Skill Level (B/I)	43%	59%
staff planning	Frequency (F, VF)	40%	42%
	Criticality (I, VI)	83%	81%
	Skill Level (B/I)	55%	61%
program planning	Frequency (F, VF)	55%	42%
	Criticality (I, VI)	93%	82%
	Skill Level (B/I)	44%	58%
program implementation	Frequency (F, VF)	56%	43%
	Criticality (I, VI)	91%	80%
	Skill Level (B/I)	49%	67%
promotion/marketing	Frequency (F, VF)	40%	31%
	Criticality (I, VI)	81%	69%
	Skill Level (B/I)	75%	77%
facility operations	Frequency (F, VF)	45%	47%
	Criticality (I, VI)	72%	81%
	Skill Level (B/I)	71%	71%
evaluation of services	Frequency (F, VF)	31%	36%
	Criticality (I, VI)	77%	79%
	Skill Level (B/I)	69%	72%
event coordination	Frequency (F, VF)	34%	36%
	Criticality (I, VI)	74%	76%
	Skill Level (B/I)	57%	61%
budgeting	Frequency (F, VF)	61%	56%
	Criticality (I, VI)	93%	95%
	Skill Level (B/I)	53%	55%
fund development	Frequency (F, VF)	38%	39%
	Criticality (I, VI)	86%	81%
	Skill Level (B/I)	75%	72%
dealing with community members	Frequency (F, VF)	70%	66%
	Criticality (I, VI)	92%	92%
	Skill Level (B/I)	50%	60%
community engagement	Frequency (F, VF)	59%	60%
	Criticality (I, VI)	90%	90%
	Skill Level (B/I)	55%	64%
strategy/long term planning	Frequency (F, VF)	36%	43%

	Criticality (I, VI)	89%	89%
	Skill Level (B/I)	64%	74%
scheduling centre resources	Frequency (F, VF)	30%	30%
	Criticality (I, VI)	66%	70%
	Skill Level (B/I)	74%	77%
team management	Frequency (F, VF)	59%	53%
	Criticality (I, VI)	91%	89%
	Skill Level (B/I)	50%	67%
<i>*Do not use/do not have and other non-responses were excluded where applicable.</i>			

APPENDIX D: Team Size

		Micro (0 to 10)	Small (11 – 50)	Medium (51 – 100)	Large (More than 100)
staff supervision	Frequency (F, VF)	50.4%	54.9%	54.5%	70.0%
	Criticality (I, VI)	80.8%	77.5%	81.8%	100.0%
	Skill Level (B,I)	55.2%	47.9%	45.5%	40.0%
staff planning	Frequency (F, VF)	38.6%	41.7%	45.5%	55.6%
	Criticality (I, VI)	83.2%	80.3%	54.5%	100.0%
	Skill Level (B,I)	60.2%	60.0%	36.4%	44.4%
program planning	Frequency (F, VF)	46.3%	52.6%	27.3%	70.0%
	Criticality (I, VI)	87.4%	85.9%	90.9%	100.0%
	Skill Level (B,I)	57.0%	46.1%	45.5%	10.0%
program implementation	Frequency (F, VF)	50.0%	50.6%	30.0%	50.0%
	Criticality (I, VI)	84.2%	85.9%	90.9%	100.0%
	Skill Level (B,I)	63.6%	54.7%	30.0%	30.0%
promotion/marketing	Frequency (F, VF)	35.1%	37.5%	20.0%	40.0%
	Criticality (I, VI)	72.4%	77.8%	80.0%	81.8%
	Skill Level (B,I)	80.5%	72.2%	70.0%	50.0%
facility operations	Frequency (F, VF)	46.2%	43.5%	40.0%	75.0%
	Criticality (I, VI)	80.3%	71.2%	80.0%	77.8%
	Skill Level (B,I)	73.0%	66.7%	60.0%	77.8%
evaluation of services	Frequency (F, VF)	30.8%	34.6%	18.2%	60.0%
	Criticality (I, VI)	78.4%	73.4%	81.8%	100.0%
	Skill Level (B,I)	72.5%	70.0%	36.4%	70.0%
event coordination	Frequency (F, VF)	34.5%	37.0%	18.2%	40.0%
	Criticality (I, VI)	76.3%	74.1%	54.5%	80.0%
	Skill Level (B,I)	64.7%	52.5%	45.5%	30.0%
budgeting	Frequency (F, VF)	60.6%	51.8%	63.6%	66.7%
	Criticality (I, VI)	94.9%	91.6%	100.0%	100.0%
	Skill Level (B,I)	61.0%	50.0%	18.2%	22.2%
fund development	Frequency (F, VF)	36.2%	44.2%	33.3%	11.1%
	Criticality (I, VI)	82.2%	82.1%	100.0%	88.9%
	Skill Level (B,I)	74.2%	76.6%	50.0%	66.7%
dealing with community members	Frequency (F, VF)	68.1%	67.9%	45.5%	90.0%
	Criticality (I, VI)	90.1%	96.4%	72.7%	100.0%
	Skill Level (B,I)	62.1%	53.6%	27.3%	10.0%
community engagement	Frequency (F, VF)	57.0%	62.7%	36.4%	80.0%
	Criticality (I, VI)	88.7%	91.6%	90.9%	90.0%
	Skill Level (B,I)	66.0%	54.2%	36.4%	30.0%
strategy/long term planning	Frequency (F, VF)	36.2%	42.7%	27.3%	50.0%

	Criticality (I, VI)	87.8%	91.5%	81.8%	90.0%
	Skill Level (B,I)	72.5%	66.2%	63.6%	50.0%
scheduling centre resources	Frequency (F, VF)	27.0%	34.3%	25.0%	33.3%
	Criticality (I, VI)	69.4%	63.4%	77.8%	77.8%
	Skill Level (B,I)	82.6%	69.0%	50.0%	55.6%
team management	Frequency (F, VF)	46.6%	66.2%	72.7%	80.0%
	Criticality (I, VI)	87.9%	90.9%	100.0%	100.0%
	Skill Level (B,I)	66.0%	48.7%	54.5%	30.0%

**Do not use/do not have and other non-responses were excluded where applicable.*

APPENDIX E: Evaluation Framework

Evaluation Framework for Leadership Training in the Community Sector

**Community Sector Council
Newfoundland and Labrador**

May 22, 2019

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Evaluation Framework for Community Sector Leader Training Program

Community Sector Council (CSC NL)

The purpose of this framework document is to guide the evaluation of the training program designed for community sector leaders in Newfoundland and Labrador. The first section presents a background description of the training program, learning objectives, logic model, and key performance indicators, a definition of how indicators are to be measured and an indication of the source of data. It is envisioned that reporting will use a combination of administrative data (collected by organizations and/or CSC NL), pre and post training assessment forms, and follow-up survey data for the analysis and presentation of results.

Community Sector Leader Training Program

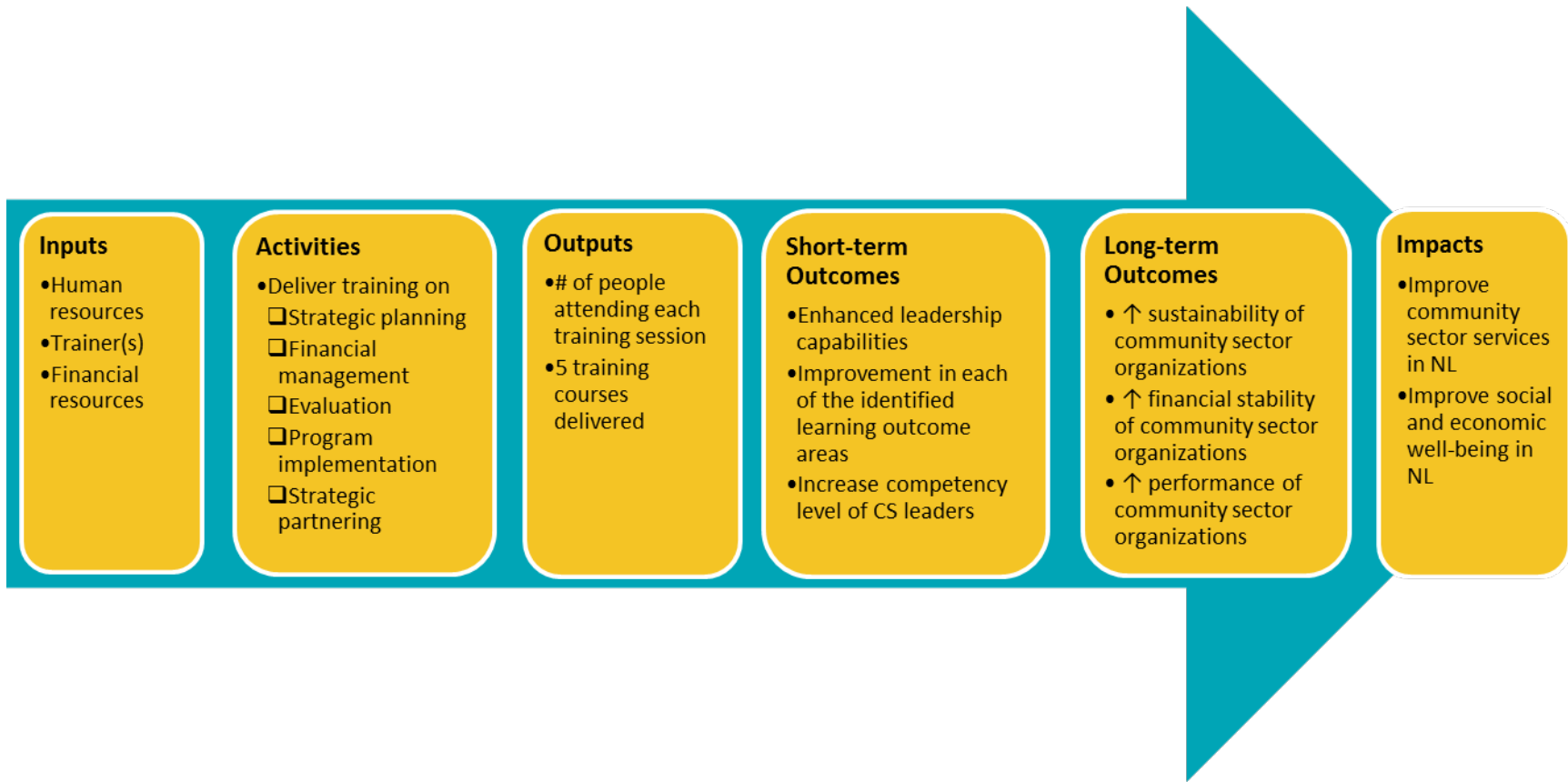
The Community Sector (CS) leader training program has been designed to improve competency areas identified as core competencies for individuals in this role (e.g., Executive Directors, Director of Operations, CEO, etc.). The core competencies for CS leaders have been identified as:

- Behavioural
 - Strategic thinking;
 - Personnel - leading people and building teams of the future;
 - Leading people and building teams of the future (volunteers);
 - Operational excellence;
 - Business acumen;
 - Adaptability;
 - Collaboration and strategic partnering;
 - Trends in the community sector;
 - Conflict resolution;
- Technical
 - Strategic financial management; and
 - Evaluation.

The training program consists of five key courses:

1. Strategic planning
2. Financial management
3. Evaluation
4. Program implementation
5. Strategic partnering

The logic model for training is provided on the following page.



Performance Monitoring and Evaluation Indicators

As part of monitoring the performance of each training program, CSC NL should track training participation data for evaluation purposes. For example, track who registers and who completes each training initiative. This is useful output information to track for evaluation purposes.

The following section provides the indicators tied to the relevance and impact of training, as well as longer term indicators related to the impact of training for community sector organizations themselves - data collected to assess each key indicator will come from a combination of administrative data (where possible), pre and post-training assessment forms, and follow-up surveys (delivered 3 & 12 months following training, ideally a third iteration at 24 months following training should be completed, if feasible).

To reduce survey burden, the Community Sector Council should consider whether any of the indicators described in the following section could be obtained through administrative or organizational data, rather than relying on follow-up survey data alone. For example, it may be worthwhile to create a formal database of information that CSC NL colleague organizations can feed into with key metrics that could be used for evaluation purposes. CSC NL should consider what information, if any, they are currently collecting on a regular basis and whether there are other metrics that they could collect which could be used to monitor performance and progress in the training areas. Other administrative/organizational data that CSC NL could consider tracking (e.g., collect and update annually) for evaluation purposes (if possible) includes:

- Confirm that the organization is still in operation
- Confirm/update contact person and contact information and key organization information (e.g., size – number of employees and volunteers, budget, primary services), if desired by CSC NL¹.
- Number of evaluations initiated and/or conducted in the past 12 months
- Number of needs assessments initiated and/or conducted in the past 12 months
- Number of program implementation plans initiated and/or conducted in the past 12 months
- Number of evaluation frameworks initiated and/or conducted in the past 12 months
- Number of new partnerships/relationships formed in the past 12 months²

An overview of the evaluation tools is provided in the table below, the tools themselves are provided in the following section.

¹ While these measures are not strictly required for the evaluation framework, the organization's size, in particular, it would be useful to provide context to other metrics.

² Using this data CSC NL can track year over year trends to determine whether metrics have increased/decreased over time. This data would be used to support/confirm participant's perspectives of these metrics in the follow-up survey.

Evaluation Tool		Timing
#1	Pre-training assessment form	Once per each training cycle – delivered before training
#2	Post-training assessment form – strategic planning	Once per each training cycle – delivered immediately after training
#3	Post-training assessment form – financial management	Once per each training cycle – delivered immediately after training
#4	Post-training assessment form – evaluation	Once per each training cycle – delivered immediately after training
#5	Post-training assessment form – program implementation	Once per each training cycle – delivered immediately after training
#6	Post-training assessment form – strategic partnering	Once per each training cycle – delivered immediately after training
#7	Follow-up survey	3 & 12 months after training (3 rd iteration at 24 months after training, if possible)

Relevance of Training

	Training is relevant to the needs of Community Sector leaders
Indicator 1	The extent to which there is a need for training on strategic planning
Source	Evaluation Tool #1: Pre-training assessment [Question #1]
Timing	Once per each training cycle
Indicator 2	The extent to which there is a need for training on financial management
Source	Evaluation Tool #1: Pre-training assessment [Question #2]
Timing	Once per each training cycle
Indicator 3	The extent to which there is a need for training on evaluation
Source	Evaluation Tool #1: Pre-training assessment [Question #3]
Timing	Once per each training cycle
Indicator 4	The extent to which there is a need for training on program implementation
Source	Evaluation Tool #1: Pre-training assessment [Question #4]
Timing	Once per each training cycle
Indicator 5	The extent to which there is a need for training on strategic partnering
Source	Evaluation Tool #1: Pre-training assessment [Question #5]
Timing	Once per each training cycle

Achievement of Outcomes

Gains in Strategic Planning - achievement of this objective is predicated on participants making measurable gains in the strategic planning learning objectives.

Short-term Outcome Indicators	
Indicator 1	Opinions and views on the extent to which the training program delivered on its learning outcomes
Source	Evaluation Tool #2: Post-training assessment
Timing	Once per each training cycle
Indicator 2	Number and percent of participants who feel that they have increased their capabilities ³ in each of the following learning outcome areas: <ul style="list-style-type: none"> ▪ Strategic planning overview ▪ Assessing the external environment ▪ Assessing the internal environment ▪ Strategic decision making ▪ Building a strategic action plan ▪ Executing a strategic action plan
Source	Evaluation Tool #2: Post-training Assessment [Question #14] / Evaluation Tool #7: Follow-up survey [Question #8a-o]
Timing	Twice (immediately following training and at least 3 months after)
Indicator 3	Number and percent of participants who feel better equipped to develop a strategic plan
Source	Evaluation Tool #7: Follow-up survey [Question #2b]
Timing	3 & 12 months after training
Indicator 4	Number and percent of participants who feel better equipped to implement and execute a strategy
Source	Evaluation Tool #7: Follow-up survey [Question #2c]
Timing	3 & 12 months after training
Indicator 5	Number and percent of participants who have set growth targets (short or long-term) for their organization
Source	Evaluation Tool #7: Follow-up survey [Question #3]
Timing	3 & 12 months after training
Long-term Outcomes Indicators	
Indicator 6	Number and percent of participants who have achieved at least some of the growth targets for their organization
Source	Evaluation Tool #7: Follow-up survey [Question #4]
Timing	3 & 12 months after training

³ For each training program “Increased capabilities” is assessed through qualitative data (Evaluation Tools #2-6: post-training assessment form, see question #14) and quantitative data (Evaluation Tool #7: follow-up survey, where increased capabilities are identified for each learning area when at least one learning outcome in each outcome area is rated as “slight increase” or “great increase”). For example:

- Q14 on Evaluation Tools #2: post-training assessment form - asks respondents whether they feel they have increased capabilities in each of the learning outcome areas of the strategic planning course.
- Q8a – 8c on Evaluation Tool #7: follow-up survey - fall under the learning outcome area “strategic planning overview”, therefore if at least one of items 8a – 8c are rated as “slight increase” or “great increase” then the participant has increased their capabilities in that learning outcome area for the purposes of this indicator.

Gains in Financial Management - achievement of this objective is predicated on participants making measurable gains in the financial management learning objectives.

Short-term Outcome Indicators	
Indicator 1	Number and percent of participants who feel that the training program delivered on its learning outcomes
Source	Post-training assessment
Timing	Once per each training cycle
Indicator 2	Number and percent of participants who feel that they have increased their capabilities in each of the following learning outcome areas: <ul style="list-style-type: none"> ▪ Introduction to community sector finance ▪ Finance and mission ▪ Financial planning and budget development ▪ Managing risk
Source	Evaluation Tool #3: Post-training Assessment [Question #14] / Evaluation Tool #7: Follow-up survey [Question #9a-l]
Timing	Twice (immediately following training and at least 3 months after)
Indicator 3	Number and percent of participants who feel better equipped to manage their organization's finances in a manner that aligns with their strategic goals
Source	Evaluation Tool #7: Follow-up survey [Question #2d]
Timing	3 & 12 months after training

Long-term Outcome Indicators	
Indicator 4	Number and percent of participants who feel that their organization is more sustainable
Source	Evaluation Tool #7: Follow-up survey [Question #2]
Timing	3 & 12 months after training
Indicator 5	Number and percent of participants who feel that their organization is more financially stable
Source	Evaluation Tool #7: Follow-up survey [Question #2k]
Timing	3 & 12 months after training

Gains in Evaluation Capacity - achievement of this objective is predicated on participants making measurable gains in the evaluation learning objectives.

Short-term Outcome Indicators	
Indicator 1	Opinions and views on the extent to which the training program delivered on its learning outcomes
Source	Post-training assessment
Timing	Once per each training cycle
Indicator 2	Number and percent of participants who feel that they have increased their capabilities in each of the following learning outcome areas: <ul style="list-style-type: none"> ▪ Evaluation overview ▪ Planning an evaluation ▪ Data and data analysis ▪ Results dissemination
Source	Evaluation Tool #4: Post-training Assessment [Question #14] / Evaluation Tool #7: Follow-up survey [Question #10a-o]

Timing	Twice (immediately following training and at least 3 months after)
Indicator 3	Number and percent of participants who feel better equipped to design an evaluation of a program/service
Source	Evaluation Tool #7: Follow-up survey [Question #2e]
Timing	3 & 12 months after training
Indicator 4	Number and percent of participants who feel better equipped to conduct an evaluation of a program/service
Source	Evaluation Tool #7: Follow-up survey [Question #2f]
Timing	3 & 12 months after training
Indicator 5	Number and percent of participants who feel better equipped to make recommendations for changes to a program/service that would improve efficiency and/or effectiveness
Source	Evaluation Tool #7: Follow-up survey [Question #2g]
Timing	3 & 12 months after training

Long-term Outcome Indicators	
Indicator 6	Number of evaluations initiated and/or conducted since completing training
Source	Administrative data / Evaluation Tool #7: Follow-up survey [Question #6]
Timing	Annual / 3 & 12 months after training

Gains in Program Implementation - achievement of this objective is predicated on participants making measurable gains in the program implementation learning objectives.

Short-term Outcome Indicators	
Indicator 1	Opinions and views on the extent to which the training program delivered on its learning outcomes
Source	Post-training assessment
Timing	Once per each training cycle
Indicator 2	Number and percent of participants who feel that they have increased their capabilities in each of the following learning outcome areas: <ul style="list-style-type: none"> ▪ Identifying the needs of the community ▪ Creating an effective implementation plan ▪ Creating an effective evaluation framework and continuous improvement monitoring
Source	Evaluation Tool #5: Post-training Assessment [Question #14] // Evaluation Tool #7: Follow-up survey [Question #11a-g]
Timing	Twice (immediately following training and at least 3 months after)

Long-term Outcome Indicators	
Indicator 3	Number of needs assessments initiated and/or conducted since completing training
Source	Administrative data / Evaluation Tool #7: Follow-up survey [Question #5a]
Timing	Annual / 3 & 12 months after training
Indicator 4	Number of program implementation plans initiated and/or conducted since completing training

Source	Administrative data / Evaluation Tool #7: Follow-up survey [Question #5b]
Timing	Annual / 3 & 12 months after training
Indicator 5	Number of needs evaluation frameworks initiated and/or conducted since completing training
Source	Administrative data / Evaluation Tool #7: Follow-up survey [Question #5c]
Timing	Annual / 3 & 12 months after training

Gains in Strategic Partnering - achievement of this objective is predicated on participants making measurable gains in the strategic partnering learning objectives.

Short-term Outcome Indicators	
Indicator 1	Opinions and views on the extent to which the training program delivered on its learning outcomes
Source	Post-training assessment
Timing	Once per each training cycle
Indicator 2	Number and percent of participants who feel that they have increased their capabilities in each of the following learning outcome areas: <ul style="list-style-type: none"> ▪ Strategic planning ▪ Communicating with your partners
Source	Evaluation Tool #6: Post-training Assessment [Question #14] / / Evaluation Tool #7: Follow-up survey [Question #12a-g]
Timing	Twice (immediately following training and at least 3 months after)
Indicator 3	Number and percent of participants who feel better equipped to identify potential strategic partners
Source	Evaluation Tool #7: Follow-up survey [Question #2h]
Timing	3 & 12 months after training
Indicator 4	Number and percent of participants who feel better equipped to pursue, establish and maintain relationships with strategic partners
Source	Evaluation Tool #7: Follow-up survey [Question #2i]
Timing	3 & 12 months after training

Short-term Outcome Indicators	
Indicator 5	Number of new partnerships/relationships formed
Source	Administrative data / Evaluation Tool #7: Follow-up survey [Question #7]
Timing	Annual / 3 & 12 months after training

Gains in Leadership and their Organizations' Performance - achievement of this objective is predicated on participants making measurable gains in their overall leadership capabilities and having an impact on key performance measures of their organizations.

Indicator 1	Number and percent of participants who feel they have improved leadership capabilities
Source	Evaluation Tool #7: Follow-up survey [Question #2a]
Timing	3 & 12 months after training
Indicator 2	Number and percent of participants who feel that their organization's performance has improved in at least one area: <ul style="list-style-type: none"> a. Client satisfaction b. Employee/Volunteer satisfaction c. Organizational stability/growth
Source	Evaluation Tool #7: Follow-up survey [Question #2l-q]
Timing	12 months after training
Indicator 3	Number and percentage of CSC NL colleague organizations still in operation
Source	Administrative data
Timing	Annual

Evaluation Tools

Evaluation Tool #1: Pre-Training Assessment Form

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Thinking about your role as a leader in a community sector organization, please identify how much you agree or disagree with the following statements...

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. I feel I could benefit from training on strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I feel I could benefit from training on financial management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. I feel I could benefit from training on evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I feel I could benefit from training on program implementation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I feel I could benefit from training on strategic partnering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. What other areas (if any) do you feel that you could benefit from training?

Evaluation Tool #2: Post-Training Assessment Form – Strategic Planning

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Please identify how much you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. The objectives of the training were clearly defined	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Participation was encouraged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The topics covered were relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The content was easy to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Handouts or materials were helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The trainer was knowledgeable about the content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel the training objectives were met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The time allotted for the training was sufficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The meeting room and facilities were adequate and comfortable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. What did you like most about the training?

12. What aspects of the training (if any) could be improved?

13. Do you feel the training program delivered on its learning outcomes (identified on the following page)? Why or Why not?

14. Do you feel that you have increased your capabilities in each of the learning outcome areas? Why or Why not?

15. Do you have any additional comments or feedback?

Learning Outcomes – Strategic Planning

Strategic Planning Overview

- Identify the questions that strategic planning must address
- Identify the analyses typically incorporated in strategic planning
- Describe how these questions and analyses can be organized into a structured strategic planning process

Assessing the External Environment

- Distinguish the various factors that impact your organization
- Identify market trends that are shaping the landscape and how they will affect your organization and your strategy

Assessing the Internal Environment

- Components of an internal assessment: Review of top programs and services; market research, resource review; and financial performance review
- Appreciate the importance of your organizational culture, missions and vision in an internal assessment

Strategic Decision Making

- Identify the role of data and insight in strategic planning
- Describe how to conduct a SWOT analysis for your organization
- Understand how to use a SWOT analysis to choose your strategic imperatives
- Determine your performance measures

Building Your Strategic Action Plan

- Begin developing your own strategic action plan

Executing Your Strategic Action Plan

- Learn how a leader builds commitment through avenues of communication throughout the execution process
- Identify ways to align the organization toward a single purpose

Evaluation

- Why establishing an extensive evaluation plan is critical to the success of any strategic plan

Evaluation Tool #3: Post-Training Assessment Form – Financial Management

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Please identify how much you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. The objectives of the training were clearly defined	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Participation was encouraged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The topics covered were relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The content was easy to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Handouts or materials were helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The trainer was knowledgeable about the content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel the training objectives were met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The time allotted for the training was sufficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The meeting room and facilities were adequate and comfortable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. What did you like most about the training?

12. What aspects of the training (if any) could be improved?

13. Do you feel the training program delivered on its learning outcomes (identified on the following page)? Why or Why not?

14. Do you feel that you have increased your capabilities in each of the learning outcome areas? Why or Why not?

15. Do you have any additional comments or feedback?

Learning Outcomes – Financial Management

Introduction to Community Sector Finance

- Identify current issues in community sector finance including the general economy, funding threats and opportunities and greater competition for limited resources

Finance and Mission

- Understand how to use financial information to make important decisions that move the organization toward mission attainment
- How to align financial planning with strategy
- Financial modeling and how to develop a long-term financial planning tool

Financial Planning and Budget Development

- Learning the process of preparing a budget
- Understand the techniques used to monitor a budget
- Understand organizational capital structure
- How to balance reserves, debt, and acquisition of new capital to fund expenditures

Managing Risk

- Tools for identifying and managing financial risk
- Fraud and theft and the reputational risk to organizations and the community sector as a whole
- Protecting financial resources through proper use of internal controls
- Understanding reporting requirements to ensure legal obligations and transparency

Evaluation Tool #4: Post-Training Assessment Form – Evaluation

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Please identify how much you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. The objectives of the training were clearly defined	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Participation was encouraged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The topics covered were relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The content was easy to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Handouts or materials were helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The trainer was knowledgeable about the content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel the training objectives were met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The time allotted for the training was sufficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The meeting room and facilities were adequate and comfortable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. What did you like most about the training?

12. What aspects of the training (if any) could be improved?

13. Do you feel the training program delivered on its learning outcomes (identified on the following page)? Why or Why not?

14. Do you feel that you have increased your capabilities in each of the learning outcome areas? Why or Why not?

15. Do you have any additional comments or feedback?

Learning Outcomes – Evaluation

Evaluation Overview

- Key Evaluation types and approaches
- The roles of internal and external evaluation
- Key evaluation design considerations
- Using evaluation models to inform strategic decision making and planning
- The role of core competencies in evaluation

Planning an Evaluation

- Planning an evaluation plan: Key components of an evaluation plan
- What is program logic and when is it helpful
- How to facilitate a program logic mapping session
- Budgeting for an evaluation

Data and Data Analysis

- Data Collection/Major methods of data collection
- The role of mixed methods in evaluation – Strategies to integrate qualitative and quantitative methods
- Data Analysis principles

Results Dissemination

- How to create a dissemination plan
- How to set dissemination targets using various techniques, specific to identified audiences
- How to evaluate the effectiveness of your evaluation dissemination

Evaluation Tool #5: Post-Training Assessment Form – Program Implementation

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Please identify how much you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. The objectives of the training were clearly defined	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Participation was encouraged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The topics covered were relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The content was easy to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Handouts or materials were helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The trainer was knowledgeable about the content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel the training objectives were met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The time allotted for the training was sufficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The meeting room and facilities were adequate and comfortable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. What did you like most about the training?

12. What aspects of the training (if any) could be improved?

13. Do you feel the training program delivered on its learning outcomes (identified on the following page)? Why or Why not?

14. Do you feel that you have increased your capabilities in each of the learning outcome areas? Why or Why not?

15. Do you have any additional comments or feedback?

Learning Outcomes – Program Implementation

Identifying the Needs of the Community

- How to conduct a needs assessment to: define the program target populations, their needs and the most effective process to deliver program goals.

Creating an Effective Implementation Plan

- How to set realistic and measurable objectives for your program
- How to assess, align and assign organizational resources to new programs
- Developing a program value proposition and marketing plan for new programs
- Setting program targets and timelines

Creating an Effective Evaluation Framework and Continuous Improvement Monitoring

- How to develop an evaluation plan and materials to determine achievement of program objectives
- How to use evaluation results and data to incorporate continuous quality improvement strategies into your implementation plan.

Evaluation Tool #6: Post-Training Assessment Form – Strategic Partnering

Date: _____ Trainer: _____

Training Program: _____ Location: _____

Please identify how much you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
1. The objectives of the training were clearly defined	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Participation was encouraged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The topics covered were relevant to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The content was well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The content was easy to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Handouts or materials were helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The trainer was knowledgeable about the content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel the training objectives were met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The time allotted for the training was sufficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The meeting room and facilities were adequate and comfortable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. What did you like most about the training?

12. What aspects of the training (if any) could be improved?

13. Do you feel the training program delivered on its learning outcomes (identified on the following page)? Why or Why not?

14. Do you feel that you have increased your capabilities in each of the learning outcome areas? Why or Why not?

15. Do you have any additional comments or feedback?

Learning Outcomes – Strategic Partnering

Strategic Planning

- Understanding the value alliances can make in developing and implementing strategy
- Learning to design effective high performing alliances: Creating specific frameworks in partner selection, network development and alliance design

Communicating with Your Partners

- Navigating and leveraging cultural differences across organizations and sectors
- Building skills successfully to address cross-sector cultural differences to build mutual trust and capture value
- Creating value propositions for your organization, targeted to different stakeholder groups
- Building cross-organizational alliance implementation skills: Developing management approaches for anticipating and resolving tensions and conflicts at every stage in the collaborative process
- Developing methods for effectively sharing knowledge with partners: Understanding what knowledge to share, and how, according to your assessment of partners' expectations and the nature of knowledge

Evaluation Tool #7: Follow-up Survey⁴

1. Which of the following training sessions did you complete? **SELECT ALL THAT APPLY**

- A. Strategic Planning
- B. Financial Management
- C. Evaluation
- D. Program Implementation
- E. Strategic Partnering

For the following questions please think about the training you received and your capabilities since completing the training.

2. Please think about identify how much you agree or disagree with the following statements:

Since completing training...

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree	Don't know	Not Applicable
a...I have improved my leadership capabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b ... I am better equipped to develop a strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c ...I am better equipped to implement and execute a strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d ...I am better equipped to manage my organization's finances in a manner that aligns with our strategic goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e ...I am better equipped to design an evaluation of a program or service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f ...I am better equipped to conduct an evaluation of a program or service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

⁴ Please note, some questions should just be administered to respondents based on which training program(s) they completed, and/or based on responses to other survey questions. Survey skips have been removed as requested

g ...I am better equipped to make recommendations for changes to a program/service that would improve efficiency and/or effectiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h ...I am better equipped to identify potential strategic partners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i ...I am better equipped to pursue, establish and maintain relationships with strategic partners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j ...I feel that my organization is more sustainable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k ... I feel that my organization is more financially stable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l... I feel that client satisfaction has improved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m... I feel that employee satisfaction has improved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o... I feel that volunteer satisfaction has improved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
p... I feel that my organization has remained stable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
q... I feel that my organization has grown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Have you set growth targets (short or long-term) for your organization?

- Yes
- I am currently in the process of developing them
- No

4. Have you met any of those growth targets?

- All of them
- Some of them
- None of them

5. Since completing the *program implementation* training session, have you initiated or completed...

	Yes		No
a. Needs assessments	<input type="radio"/>	How many initiated? _____ How many completed? _____	<input type="radio"/>
b. Program implementation plans	<input type="radio"/>	How many initiated? _____ How many completed? _____	<input type="radio"/>
c. Evaluation frameworks	<input type="radio"/>	How many initiated? _____ How many completed? _____	<input type="radio"/>

6. Have you initiated or completed any evaluations of your organization's programs and/or services since completing the *evaluation* training session?

- Yes —————> How many initiated? _____
How many completed? _____
- No

7. Have you formed any new partnerships or relationships since completing the *strategic partnering* training session?

- Yes —————> how many? _____
- I am currently pursuing partnerships/relationships
- No

8. For each of the following learning outcome areas please identify whether you have increased your capabilities in each area since completing the *strategic planning* training session...

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
a. Identifying the questions that strategic planning must address	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Identifying the analyses typically incorporated in strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
c. Describing how these questions and analyses can be organized into a structured strategic planning process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Distinguishing the various factors that impact your organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Identifying market trends that are shaping the landscape and how they will affect your organization and your strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Identifying the components of an internal assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Appreciating the importance of your organizational culture, missions and vision in an internal assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Identifying the role of data and insight in strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Describing how to conduct a SWOT analysis for your organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. Understanding how to use a SWOT analysis to choose your strategic imperatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. Determining your performance measures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Developing your own strategic action plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
m. Learning how a leader builds commitment through avenues of communication throughout the execution process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
n. Identifying ways to align the organization toward a single purpose	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o. Understanding why establishing an extensive evaluation plan is critical to the success of any strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. For each of the following learning outcome areas please identify whether you have increased your capabilities in each area since completing the *financial management* training session...

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
a. Identifying current issues in community sector finance including the general economy, funding threats and opportunities and greater competition for limited resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Understanding how to use financial information to make important decisions that move the organization toward mission attainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. How to align financial planning with strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Financial modeling and how to develop a long-term financial planning tool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Learning the process of preparing a budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Understanding the techniques used to monitor a budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. How to balance reserves, debt, and acquisition of new capital to fund expenditures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Understanding organizational capital structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Tools for identifying and managing financial risk							
j. Fraud and theft and the reputational risk to organizations and the community sector as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
k. Protecting financial resources through proper use of internal controls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Understanding reporting requirements to ensure legal obligations and transparency							

10. For each of the following learning outcome areas please identify whether you have increased your capabilities in each area since completing the *evaluation* training session...

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
a. Identifying key evaluation types and approaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Understanding roles of internal and external evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Understanding key evaluation design considerations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Using evaluation models to inform strategic decision making and planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. The role of core competencies in evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Understanding what program logic is and when is it helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. How to facilitate a program logic mapping session	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Planning an evaluation plan: Key components of an evaluation plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Budgeting for an evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. Data Collection/Major methods of data collection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. The role of mixed methods in evaluation – Strategies to integrate qualitative and quantitative methods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Data Analysis principles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m. How to create a dissemination plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
n. How to set dissemination targets using various techniques, specific to identified audiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o. How to evaluate the effectiveness of your evaluation dissemination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. For each of the following learning outcome areas please identify whether you have increased your capabilities in each area since completing the *program implementation* training session...

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
a. Knowing how to conduct a needs assessment to: define the program target populations, their needs and the most effective process to deliver program goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Knowing how to set realistic and measurable objectives for your program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Knowing how to assess, align and assign organizational resources to new programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Developing a program value proposition and marketing plan for new program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Setting program targets and timelines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Knowing how to develop an evaluation plan and materials to determine achievement of program objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Knowing how to use evaluation results and data to incorporate continuous quality improvement strategies into your implementation plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. For each of the following learning outcome areas please identify whether you have increased your capabilities in each area since completing the *strategic partnering* training session...

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
a. Understanding the value alliances can make in developing and implementing strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Learning to design effective high performing alliances: Creating specific frameworks in partner selection, network development and alliance design	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Navigating and leveraging cultural differences across organizations and sectors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Building skills successfully to address cross-sector cultural differences to build mutual trust and capture value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Creating value propositions for your organization, targeted to different stakeholder groups							
f. Building cross-organizational alliance implementation skills: Developing management approaches for anticipating and resolving tensions and conflicts at every stage in the collaborative process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Great Increase	Slight Increase	No Change	Slight Decrease	Great Decrease	Don't know	Not Applicable
g. Developing methods for effectively sharing knowledge with partners: Understanding what knowledge to share, and how, according to your assessment of partners' expectations and the nature of knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>