Mel King Institute
for community building

EVALUATION REPORT -YEAR TWO

2011

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TABLE OF CONTENTS

INTRODUCTION

The Mel King Institute for Community Building fosters vibrant and thriving Massachusetts communities by advancing the skills, knowledge and leadership ability of professional practitioners and volunteer leaders in the community development field. The King Institute leverages collaborative educational partnerships that increase access, encourage innovation, and promote and institutionalize systemic success. The Institute is designed to bring community development professionals and volunteers the skills they need to be effective in their positions in the community. To reach its goals, the Institute sponsors trainings, serves as a clearing house, and provides technical assistance.

The Institute is committed to evaluation and continual learning. In the fall of 2009, the Steering Committee invested in the development of an evaluation system that could provide it with feedback from participants and organizational leaders about the Institute's impact. I was hired as the evaluator to facilitate the process and worked with a committee comprised of King Institute partners to develop a logic model, survey questions and instruments, and an overall evaluation plan. At the conclusion of the first year of operations, I prepared a report evaluating the courses offered from December 2009 through June 2010. The evaluation consisted solely of a review of the survey responses submitted by participants during the courses and in a few instances, three to six months after the course was completed. The report was issued in August 2010, and presented to the Steering Committee in September 2010.

For the second year of operations, the King Institute expanded the scope of the evaluation to include interviews of prior participants to capture individual experiences and to better understand the longitudinal impact of the Institute's work. [The revised evaluation methodology is consistent with several recommendations drawn from the Year One Evaluation – see recommendations 6, 7, and 8 on page 4.] Students as well as supervisors and Executive Directors were interviewed in May and June 2011. Seventeen people from seven organizations participated in the interview process. Participants interviewed had attended one or more among a list of thirteen courses spanning the time period December 2009 to April 2011. An initial evaluation summarizing the findings from the interviews was submitted to the King Institute in June 2011. (See the Appendix 1 for the interview list.)

To complete the Year Two Evaluation, a thorough review of the day-of surveys was subsequently conducted in July and August 2011. The findings from both the interviews and the survey review are included in this report. Where applicable, comparisons between Year One and Year Two are offered. The report also includes a summary of the outcomes evaluated (drawn from the logic model), summary of the recommendations offered from the Year One Evaluation, and a demographic analysis of the students.

PLANNED OUTCOMES

The long term objective of the King Institute is that more community development organizations have qualified professionals and leaders, and in turn, will have a greater capacity to deliver on their mission of community building. The King Institute is dedicated to providing quality

training programs to a broad spectrum of individuals and organizations across the state. This report examines several outcomes drawn from the logic model.

Process outcomes
The Logic Model focuses on the results of the training and its impact on the participants and their organizations. However, prior to any of those outcomes, the Institute must be successful in organizing the training program itself. Therefore, the team included a process outcome for review.

1. Training programs are well coordinated and organized to provide easy access to a wide variety of individuals in the CD field that meets their needs.

Outcomes for Individuals
The King Institute is interested in helping participants learn new skills and then apply those practices to improve their performance. The following outcomes were priorities from the logic model.

1. Participants gain access to applicable tools and knowledge
2. Participants increase knowledge and skills for job performance and professional development
3. Confidence grows to try new skills and take risks
4. Participants practice and apply new knowledge and skills at CDC
5. Job Performance in new practice areas improves

Outcomes for Organizations
The King Institute has set out several outcomes targeted at the organizational level which include:

1. CDC applies and adopts best practices from training
2. CDC improves practices and becomes more effective organization
3. CDC increases ability to retain effective staff and attract new hires
4. CDC has articulated professional development plans
5. CDC increases awareness & ability to access appropriate training opportunities to best meet their needs

Other Outcomes
Another area of focus for the Institute is to foster learning among peers, and to encourage follow up among peers in sharing best practices and strategies. The outcomes pertaining to this area include:

1. Participants gain access to learning from and with peers
2. Sharing of skills/ knowledge, relationships among peers grows

SUMMARY OF YEAR ONE EVALUATION RECOMMENDATIONS

At the conclusion of Year One, the Steering Committee reviewed the Evaluation Report and its recommendations which are included here as a point of reference. Where applicable, comments are offered regarding the King Institute's response to these recommendations during Year Two.

1. Document processes used at the early stages that have been successful and replicate as the Institute moves ahead.
2. Continue to encourage a high rate of return for the day-of-event surveys.
3. Review the few cases of lower ratings for some courses and institute changes needed.
4. Consider targeted marketing to reach members of boards of directors.
5. Review analysis of the audience profile and consider other outreach strategies if needed to reach other audiences if desired.
6. Determine incentives, direct contact, or other ways to increase the number of participants who complete the follow-up surveys.
7. Consider a more targeted evaluation in future years by interviewing participants directly.
8. Interview supervisors, executive directors, and/or board members to evaluate impact on organizations who have sent numerous individuals to King Institute training sessions.
9. Continue to use the survey and other data gathering methods to evaluate your impact and use the information you collect to further strengthen the Institute.

SUMMARY OF COURSES AND PARTICIPANTS

From July 2010 through July 2011, the Mel King Institute for Community Building enrolled 263 participants in 19 courses. The courses reviewed for the purposes of this evaluation are listed in Appendix 2.

Of the 263 participants, a total of 227 completed an evaluation at the time of the course (86% response rate.) This is comparable to the Year One response rate (87%), and is consistent with the Year One Evaluation Recommendation #2. Of the 227 respondents 220 provided their name and 29 attended more than one course. (13 attended two courses, five attended three courses, seven attended four courses, and four attended five courses.) The single-counted participant rate for demographic analysis is 160. This compares with Year One along the following lines:

	Year One	Year Two
Number Courses Analyzed	9	19
Number Total Participants	157	263
Number Total Evaluations	137	227
Number Repeat Participants	29	29
Single Counted Participants	108	160

### DEMOGRAPHIC PROFILE OF PARTICIPANT BASE
In order to accurately analyze the demographics of the participants, the following demographic profile represents a single counting of participants (160 people.) (This analysis only pertains to those submitting 'day of survey' forms.)

Participants by Position

Participants by Position

Board 5%
Other 10%
Manager 35%
Americorps 18%
Staff 32%
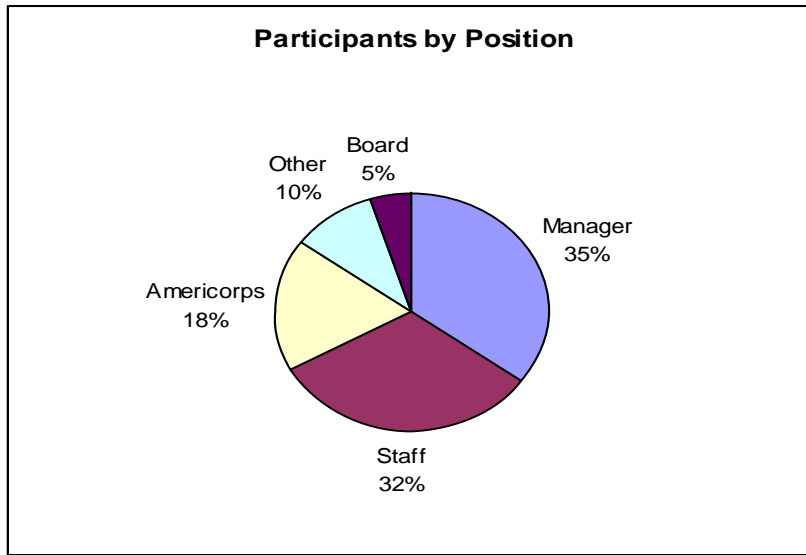
Year Two shows a slight variation from Year One in which close to 55% of the participants were staff and close to 40% were managers, 3% were Americorps and 4% were other leaders. In Year Two, there was an increase in both the number of Americorps, other leaders and Board members. The Institute's progress in increasing Board participation is consistent with the Year One recommendation #4.

Participants by Age

Participants by Age

40-54 30%
Under 25 25%
Over 55 17%
26-39 28%
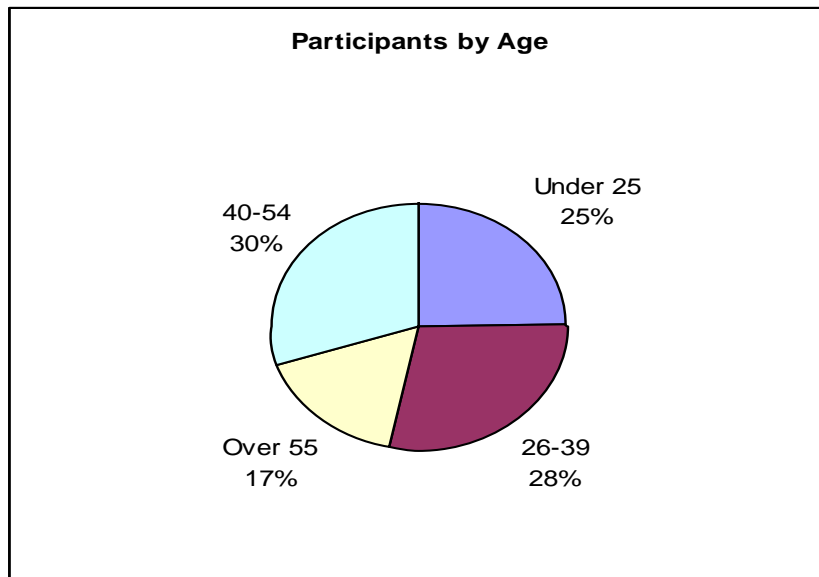
In Year One, 66% percent of participants were under 40, as in contrast with Year Two where 53% were under 40, indicating a greater balance between participants under 40 in Year Two and those over 40 (47% in Year Two as contrasted with 34% in Year One.)

Participants by Race
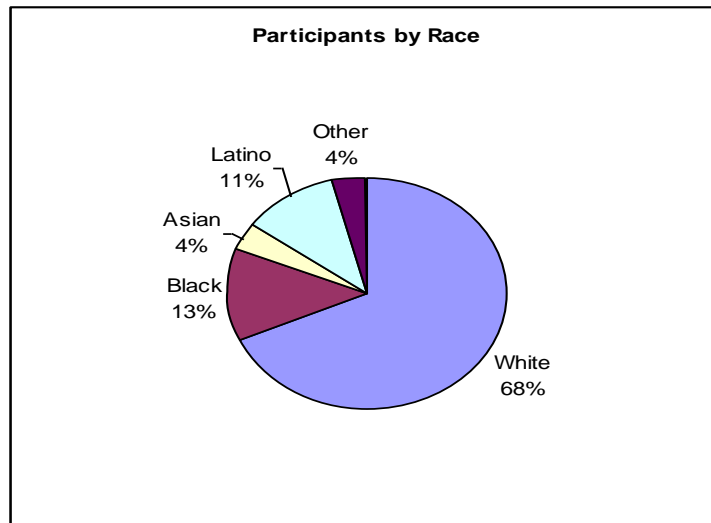
The overall breakdown of participants by race in Year Two – White 68% and People of Color 33% - is very similar to Year One (66% of participants were White, and a total of 34% were People of Color.) Among the different racial groups participating, there was a consistent level of those who are Latino, but in Year Two, the number of Blacks increased by 62% from 13 to 21, and the number of Asians increased by 133% from 3 to 7, and the number of other participants increased by 200% from 2 to 6.
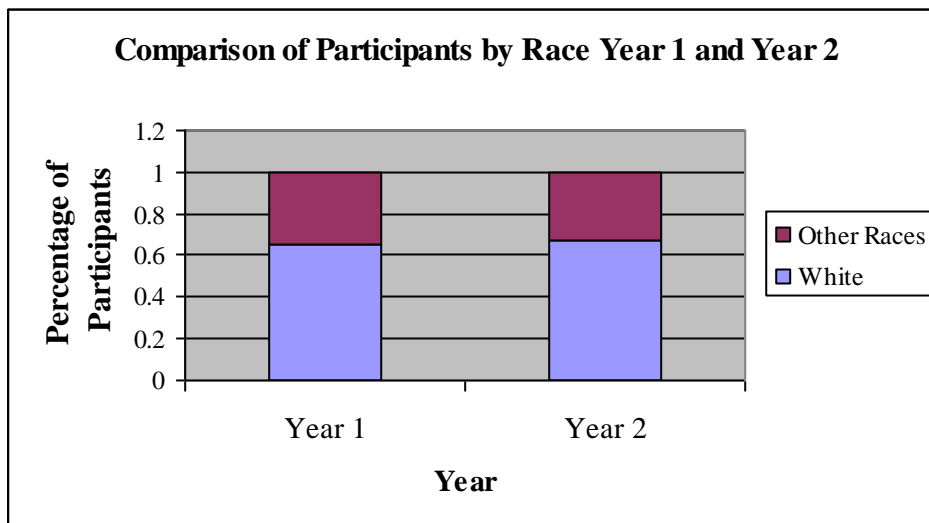
Participants by Age and Race
To further analyze which courses attract participants of different ages and races, a chart is provided (see Appendix 3). The courses that attract the most people who are over 40 focus on small business or real estate development, whereas the courses with the highest number of people under 40 are leadership development, group facilitation and organizing. This is largely due to the demographics of the people in those staffing positions (Americorps members who

attended the latter set of courses are generally in their 20s, and the participants in the series of courses focused on small business development are seasoned professionals who tend to be over 40.) All of the participants in the Corporate Governance course were over 40 (four out of seven participants were Board members, and two others were managers indicating that organizations sent more seasoned members to this course.) The racial balance across the courses is more varied as the chart indicates. The courses with the greatest racial balance were Redeveloping Foreclosed Properties, Community Development 101, and Understanding and Controlling your Program Finances.

Participants by Location
The King Institute continues to be largely serving participants from Greater Boston but is also attracting attendees from across Massachusetts and from Rhode Island.
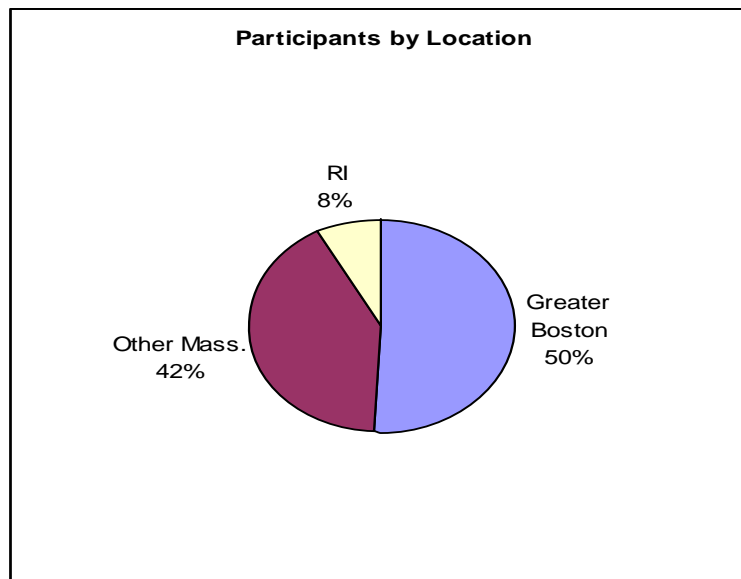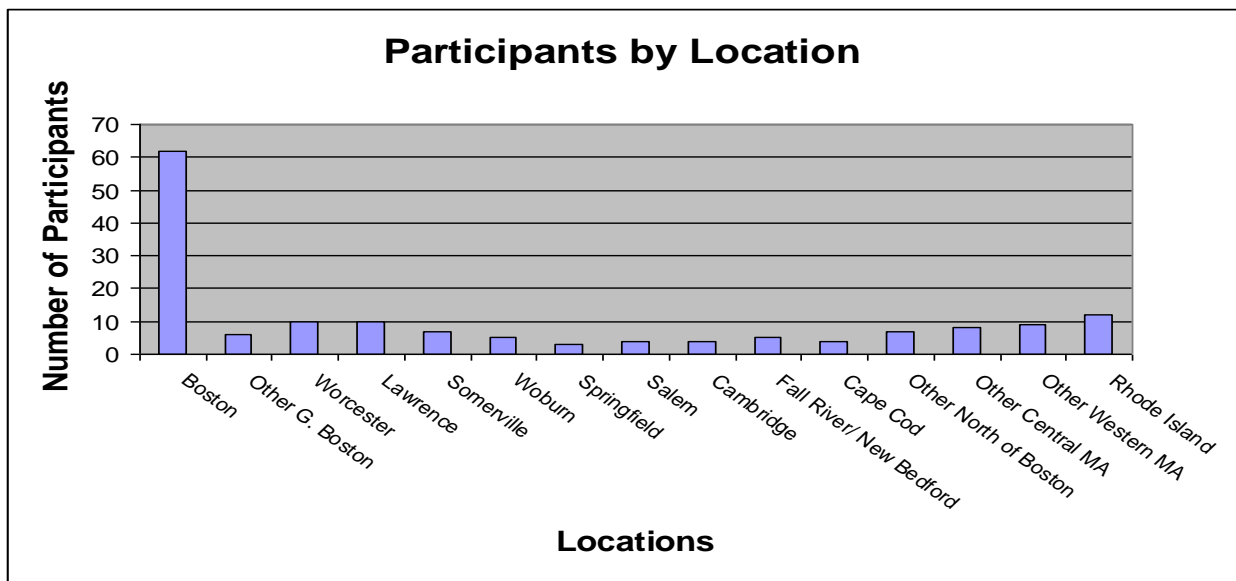
In comparison with Year One, the King Institute in Year Two served participants from a more diverse geography. (In Year One, 59% of participants were from Greater Boston and 33% were from other parts of Massachusetts, and 8% were from Rhode Island.) During the follow-up interviews, those not in the inner core of Boston shared their appreciation that the Institute is offering courses in other locations and working to reach a statewide audience.

OUTCOME DATA

The impact of the King Institute is measured along four dimensions:
- Process outcomes which measure satisfaction with the training
- Outcomes for individuals
- Outcomes for organizations
- Other outcomes that examine peer to peer interaction

PROCESS OUTCOMES

Process outcomes are indicators of participant satisfaction with the training format, quality of presenters, and access to the Mel King Institute. They are referred to as 'process' as contrasted with 'impact' because they relate to the way the training is organized, the presenters, and the King Institute's communication processes, rather than the results gained by participants.

The day-of-survey included three questions correlated with process outcomes - Training programs are well coordinated and organized to provide easy access to a wide variety of individuals in the CD field that meets their needs. Each question is shown in italics. The full breakdown for each course is included in the appendix. [Note: not all evaluations utilized the same questions and therefore some courses are omitted from the analysis below.] Feedback from the follow-up interviews is included where applicable. Quotes are offered to further illustrate a point. In some cases, when available, the course is listed.

Summary
Overall, satisfaction ratings from the day-of-surveys are very high with all but a couple of participants rating questions 5, 6, and 7 as either strongly agree or agree. While this is not an indication of long term impact, it is vitally important that the Institute have a high rate of 'customer' satisfaction and survey results confirm this to be the case.

General feedback from the follow-up interviews concurred with this conclusion. Comments highlighted the following:
- Highest quality of trainers and programs, including nationally renowned and respected leaders in the field
- High quality instructional techniques
- Curriculum that meets the needs of the audience
- Extremely affordable
- Diversity of topics
- Easy access
- Highly practical

"We don't have a lot of other professional development opportunities and often the budget goes unspent. This was high value and cost efficient. This was perfect – cost was good, time wasn't too much, and it was very practical to what we are working on."

"Overall, the King Institute is a very valuable resource personally and professionally and for the field as a whole."

"The concept of the King Institute and how it has been carried out is excellent. Even the fact that they are doing this evaluation is great. I've been very impressed. It is an incredible and needed resource."

Both of the Institute's staff received the highest praise for their work in making the Institute a success.

"Shirronda and Jay did everything I could have asked for as an instructor. They handled the logistics which meant I had more time to focus on the training."

"The staff is very approachable and the logistics are good."

Day-of-Survey Results – Process Outcomes

Question 5: **Rate the quality of the presenters**: *Presenters were clear, had expertise and knowledge in the subject area, and had effective presentation styles*. Participants used a rating scale of strongly agree, agree, disagree, and strongly disagree. See Appendix 4 for the full report. When combining ratings of strongly agree with agree, nearly 100% of participants rated the quality of presenters as high. Only one person across the entire data set strongly disagreed (Small Business Financial Analysis.) The average percentage across all courses for strongly agree was 75%. This is consistent with the findings from Year One, indicating that the King Institute continues to offer courses led by high quality instructors.

The courses with the highest ratings (strongly agreed) were:
- Managing your multi-family portfolio (100%)
- LISC Project Manager Seminar (100%)
- Leadership Development Strategies for Community Development Practitioners (94%)
- Group Facilitation: Bringing Community Meetings to Life (94%)
- Small Business TA Seminar 6 (89%)

The courses with the lowest ratings of strongly agree were:
- Understanding and controlling your program finances (50%)
- Small Business Financial Analysis (47%)
- Community Development 101 (45%)

The instructors were noted to be extremely knowledgeable, able to engage everyone to participate, and clear and approachable.

"Wow! Great training: great job of balancing lecture/discussion/breaks/developing an arc/pushing toward a discussion of how to apply these discussions." *Leadership Development Strategies for Community Development Practitioners*

"The instructor was extremely knowledgeable and a very good communicator with people at all experience levels." *Mixed Use Real Estate*

"Presenters clearly had tremendous knowledge and experience of the field and were very effective in communicating during the presentations. I felt that they listened to what was said and integrated it into the discussion." *Planning for Community Development Practitioners*

"The instructor did an excellent job teaching about popular education by utilizing popular education methods and techniques." *Introduction to Popular Education*

"Had great stories about social justice strategies used right in Boston and Jamaica Plain. Very engaging, it was great to see our ideas being written down, not just reading." *Basics of Community Organizing Social Capital*

Some suggestions were offered for improvement such as providing more specific examples and allowing more time for practice. In a few cases, expectations of the course were not met due to the focus of the course and the match with attendees skills or interest. In at least one instance, the participants role in creating the agenda was very beneficial to the course being targeted to exactly what people wanted (the small business training series.) While not practical for all courses, this may be a strategy that other courses should consider, especially in a series format, to ensure that the course material matches the interests and skill level of the participants.

"Only thing that can be improved is that it's a lot of material covered in a short amount of time. More time to go over more in depth would be appreciated." *Small Business 4*

"Would like examples of actual businesses in manufacturing, service, and retail; would have been helpful to have an example ready to be entered in the tool; the one we used was flawed." *Small Business 4*

"I expected the course to be a bit more about mixed-use and/or commercial development and was disappointed it focused more on residential." *Mixed Use Real Estate*

"Better for people with a little knowledge. As a blatant novice, I needed more precision in small things." *Nonprofit Housing Management Specialist*

<u>Question 6: Rate the organization of the training</u>: *The training was well organized and the site was conducive to the group's learning.* Participants used a rating scale of strongly agree, agree, disagree, and strongly disagree. See Appendix 5 for a full report. Most participants agreed that the trainings were well organized. While not quite as high as those rating the quality of the presenters, 67% of respondents strongly agreed and nearly all of the other participants agreed. Only two people either disagreed, or strongly disagreed.

The courses with the highest ratings of strongly agreed were:
- Managing your multi-family portfolio: 100%
- Leadership Development Strategies for Community Development Practitioners: 88%
- Corporate Governance for CDCs and their Board Members: 83%
- Small Business TA Seminar 4: 78%
- Nonprofit Housing Management Specialist: 78%

The course with the lowest ratings of strongly agreed were:

- Mixed Use Real Estate Finance: 47%
- Redeveloping Foreclosed Properties: 45%
- Community Development 101: 45%
- Understanding and controlling your program finances: 43%

"One of the best and most useful trainings I have attended. This course was a great refresher. The new market tax credit section was very helpful." *Mixed Use Real Estate Finance*

"I love LCW. Wish I could come here everyday. It was really inspirational to have the training in such a well connected community location Great site! Awesome tour. Everything was well done." *Leadership Development Strategies for Community Development Practitioners*

"Easy commute from Sturbridge. Parking a real plus. Comfortable space to work in - great windows. Excellent health food options." *Nonprofit Housing Management Specialist*

"The day was well paced and interactive. The space was comfortable and easy to get to. Great trainer. Lunch was great too!" *Intro to Popular Education*

Some comments pointed to the need to adjust the pacing of the courses or additional materials that would be helpful. Others commented on the room being either too cold or too hot. Consistent with comments associated with Question 5, some participants felt the course was not an appropriate match for their skill level.

"I am not as prepared as others taking the class, so would have done better with a slower presentation. The instructor correctly paced the course based on the majority of the class." *Mixed Use Real Estate Finance*

"Would have helped to receive the materials prior to workshop; Case book should have answers in the back and more space for work problems." *Mixed Use Real Estate Finance*

"Reviewing the entire manual was a bit too much, hard to keep attention/focus during that portion of the day. Better to review less and go more in depth." *Building leaders, Building communities*

"I do not think I should have attended. Never knew it was the 2nd module of 6. I needed the prerequisite knowledge. I was welcomed and accommodated but the learning curve was steep and often frustrating." *Nonprofit Housing Management Specialist*

"Would have been useful to get more detail about how to create a popular education series or curriculum for specific goals. A bit bogged down with side tracks. Small group presentations are not always effective." *Intro to Popular Education*

Question 7: **Rate access to the King Institute registration process**: *It was easy to register through the website and other means.* Participants used a rating scale of strongly agree, agree, disagree, and strongly disagree. Nearly all participants rated the access to the King Institute highly, either strongly agreeing, or agreeing with the above statement. Only five participants disagreed or strongly disagreed. See Appendix 6 for the full report.

The courses with the highest ratings of strongly agree were:
- Corporate Governance: 100%

- NHMS: 88%
- Leadership Development for CD practitioners: 71%
- Urban and Regional Planning for Community Development Practitioners: 64%
- Building leaders: building communities: 63%
- Understanding and controlling program finances: 57%

The courses with the lowest ratings of strongly agree were:
- Redeveloping Foreclosed properties: 44%
- Small Business TA 5: 43%

The five courses where a participant disagreed were:
- Disagreed: Popular Education: 8%, Mixed Use Real Estate Finance: 6%, Small Business TA 4: 11%
- Strongly disagreed: Building leaders: building communities: 6%, Redeveloping Foreclosed properties: 11%

PROCESS OUTCOMES CONCLUSION

Overall, the King Institute continues to be highly rated by almost all of its participants along various indicators of customer satisfaction. The instructors were praised as highly knowledgeable, able to engage the students and adapt to their needs, the courses were generally well-organized, and designed using a variety of techniques. The Institute staff and registration process also received high marks from the participants. The follow-up interviews supported these findings, illustrating that the King Institute's second year provided high quality and practical training to the community development field.

Several comments suggest that there were instances in which the course material did not match the expectations or skill level of the participants. This can be addressed through greater specificity in the course descriptions, prerequisite requirements, and/or direct communication with the students prior to the workshop. In addition, providing materials beforehand may enhance the impact of the course.

IMPACT OUTCOMES

The King Institute seeks to build the skills and capacities of individuals working in the community development field, and to improve the performance of their organizations. This evaluation, therefore, examined outcomes for individuals, organizations, as well as the interaction among peers. The evaluation correlated outcomes from the logic model with specific day-of-survey and follow-up interview questions.

OUTCOMES FOR INDIVIDUALS

Five outcomes for individuals were evaluated.
1. Participants gain access to applicable tools and knowledge
2. Participants increase knowledge and skills for job performance and professional

    development
3. Confidence grows to try new skills and take risks
4. Participants practice and apply new knowledge and skills at CDC
5. Job Performance in new practice areas improves

1. <u>Participants gain access to applicable tools and knowledge</u>

Day-of-survey Question # 8: *Did you learn about new tools or gain knowledge that is applicable to your position?* Participants were asked to answer Yes, Somewhat, or No. See Appendix 7 for the full report.

The overall ratings for this question are very high. All but one person stated that they learned something that would be useful in their position. In total, 84% of participants responded Yes, and close to 16% responded Somewhat to whether they learned new tools or gained knowledge applicable to their position. For every course, at least 70% rated this question Yes. Three courses had 100% Yes ratings: LISC Project Manager Seminar, Small Business Financial Analysis, and Corporate Governance. Only one person out of the entire data set rated this question as No. The results for Year Two are similar to Year One – 82% responded Yes, 18% responded Somewhat, and no one responded No.

Follow-up interviews: The follow-up interviews, all of the participants reiterated that the trainings were highly practical and immediately applicable to their current work.

> "There was opportunity to make the concepts concrete and think about how to adopt and apply them to our ongoing work."

> "Every time I left a training session, I reproduced the handouts for use with the community."

> "We have a clearer understanding of what it means to be an asset manager vs. a property manager. Our team had been spending too much time on certain resident aspects which really belong in property management; now we've been pushing ourselves away from the day to day resident issues to focus more on the total asset."

2. <u>Participants increase knowledge and skills for job performance and professional development</u>

This outcome correlates with the day-of-survey questions 9, 10, and 11.

Day-of-Survey Question 9: *Please rate the degree to which the information presented was useful to strengthening your work in your current position.* Participants were asked to rate the information along a scale of 'extremely useful' to 'not at all useful' for each of the major topics of the course. See Appendix 8 for a full report.

Over half of the participants rated the course material, across all courses and all subjects, as extremely useful to strengthening their work in their current position. An additional 37% of participants rated the material useful, and 9% rated it as somewhat useful. Only 2% of the total respondents stated that the material was not useful to their learning.

These percentages are similar to the averages from Year One – material was extremely useful: 53%, useful: 36%, somewhat useful: 11%, and not useful: less than 1%.

The chart below compares courses along the dimension of Usefulness.
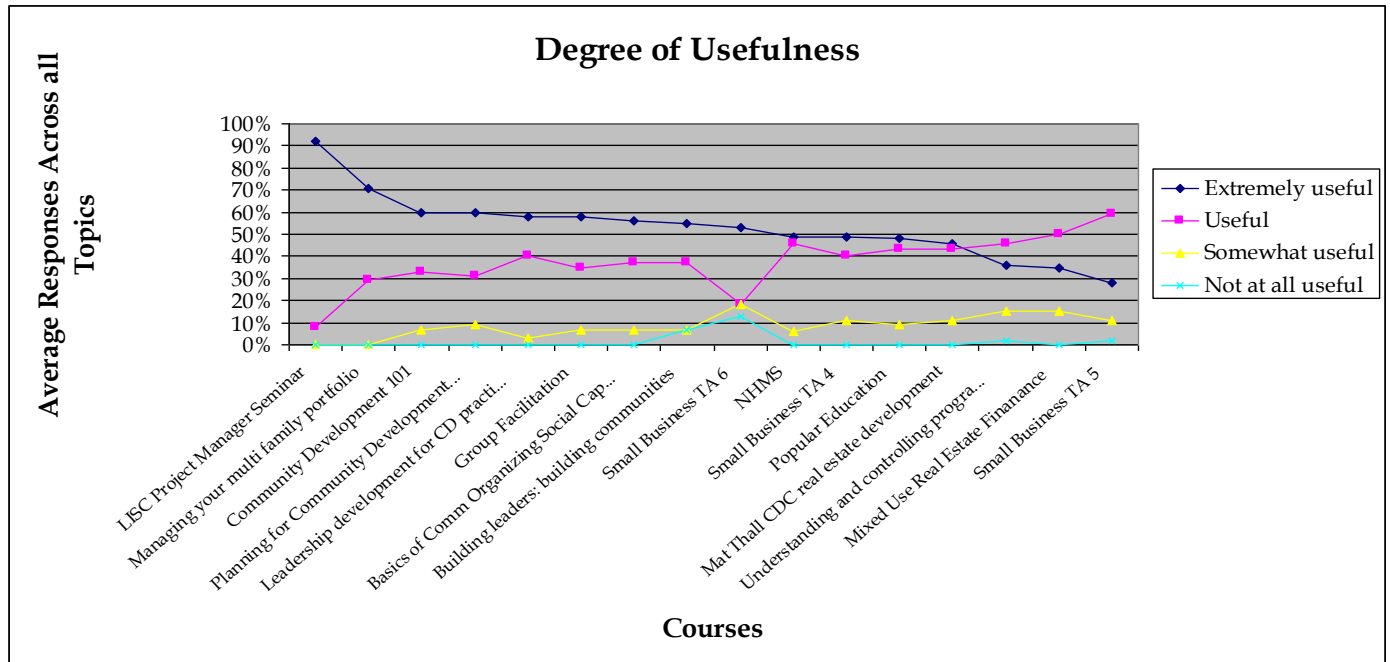
Day-of-survey Question #10. *Do you believe that the new skills or knowledge you gained today will help you to advance professionally in the community development field?* Participants were asked to answer yes, somewhat, or no. See Appendix 9 for the full report.

Summary: Over 80% of participants on average stated that the new skills or knowledge would be helpful to them in advancing professionally in the community development field. Another 16% stated that it would help somewhat, and only 1% felt it would not be of help. These percentages are slightly higher when compared with Year One (77% - Yes, 18% Somewhat, and 5% No).

The highest ranked courses where all participants responded Yes were Leadership Development for CD Practitioners, Managing your Multi Family Portfolio, NHMS, Mat Thall CDC Real Estate Development, Corporate Governance, and those classes where over 90% responded Yes were Group Facilitation and Building Leaders: Building Communities. The three courses where a single individual stated that the material would not be helpful in advancing in the field were Small Business Financial Analysis, Understanding and Controlling Program Finances, and Small Business TA 6.

Do you believe that the new skills will help you advance professionally in the CD field?

No
1%

Somewhat
16%

Yes
83%
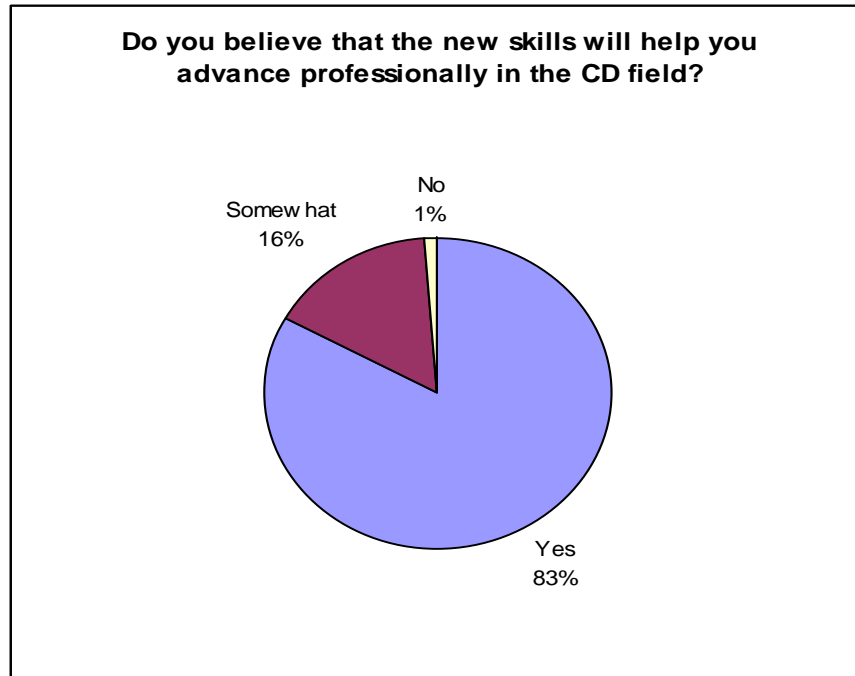
Day-of-survey Question 11: *How do you envision applying the new skills or knowledge you gained today to improve your work or help your organization?* Extensive answers were provided. See Appendix 10 for a full list. A sample of participants comments are below:

- Working on strengthening and deepening relationships with lenders. *Small Business 5*

- New approaches to fundraising/ marketing and promotion, and outcome measurement. *Small Business 6*

- Extremely helpful in evaluation, policy, regulation and the development of new programs for our local housing & economic development goals. *Mixed Use Real Estate Finance*

- Improve my own leadership skills as well as continuing to push my organization to incorporate it more into our culture, to create an organizational environment conducive to leadership development. Changing training from education to leadership opportunity and reexamine entry points and how to develop more. *Leadership Development Strategies for Community Development Practitioners*

- Develop asset management plan, take steps to meet benchmark goals; utilizing the spreadsheet for tracking portfolio, develop strategies for improving project performance. *Managing your Multi-Family Portfolio*

- Organize a neighborhood watch type coalition, empowering and communicating with local youth; coordinating resources for residents; recruiting, and maintaining leaders. *Building Leaders, Building Communities*

- Better structure and activities to improve conversations and overall meeting effectiveness; completely re-imagine and reorganize my meetings to make them more dynamic; using springboard activities to initiate conversation. *Group Facilitation*

- Review financial information from a new view point and with a new understanding; improve basic reporting, coordinate property and asset management better, communicate better with staff a plan to improve our existing portfolio and collaborate more on the initial planning stages of proposed properties. *NHMS*

- Paying more attention to how my budget fits into agency budgets, reading agency audits; engage my department staff in my next budget process; merging outcomes with financials to strengthen our outcome stories. *Understanding and Controlling your Program Finances*

- More awareness of learning styles and leadership styles when working with community leaders; constantly assess learning/teaching process, participant needs, interest level, and understanding. *Intro to Popular Education*

- Applicant analysis for our new micro business program; creating new business plans and annual revenue analysis; helping some existing clients prepare to take their business to the next level and get preapproved for financing; evaluating the quality of individual borrowers in our portfolio. *Small Business Financial Analysis*

- Review our policies and bylaws, and board composition. *Corporate Governance*

- Helpful for planning future campaigns/initiatives. Networking and communication skills. Coordinating our individuals with developmental disabilities to become a force/tool in campaigns. *Basics of Community Organizing Social Capital*

3. <u>Confidence grows to try new skills and take risks</u>

Evidence that confidence grew among participants was gleaned from the follow-up interviews and through comments offered in the day-of-surveys. (This outcome does not tie directly to a day-of-survey question.) In several of the follow-up interviews, an increase in confidence was noted by a participant and by a supervisor.

"The training increased my confidence."

"The training definitely increased her level of confidence. She comes up with her own ideas now, and needs [the supervisor] less. And her ideas are better informed."

Comments from the day-of-survey included:

"I feel more confident analyzing budgets and hope to encourage other board members to better understand them as well." *Understanding and Controlling Program Finances*

"I have greater confidence in the technical understanding I already have, and greater awareness of other ideas and approaches." *Planning for Community Development Practitioners*

"It helped improve my confidence by meeting with peers." *Redeveloping Foreclosed Properties*

4. <u>Participants practice and apply new knowledge and skills at CDC</u>

A large component of the follow-up interviews was focused on identifying ways in which participants practiced and applied new knowledge and skills at their organization. (This outcome was not included in the day-of-survey because it inherently requires the person to return to their

place of work and have the opportunity to practice.)

All of the interviewees shared specific examples of practice and applicability for their new skills.

> "This was one of the more practical trainings for the work we do. I use the skills and materials weekly. It is a larger part of my job." *Group Facilitation*

> "We will use excerpts from the [leadership training] in our own resident leadership workshops." *Intro to Popular Education*

> "During the course, we evaluated our own portfolio with the help of the trainer, identified problems with the portfolio and took these issues of higher vacancy back to the property management company and started to track this and improve it over time. Now we make sure the wait list is sufficient and we get reports on this from property management." *Nonprofit Housing Management Specialist*

Other specific examples offered of applicability included:
- Creation of a resident committee
- Improved intake process and forms
- Standardized and improved tracking outcome and output measures
- Translating problems into issues, and creating campaigns around issues
- Improved use of icebreakers
- Improved listening skills
- Mapping community assets

The ability to incorporate the lessons learned once back at home appears to be dependent on numerous factors. Some of the King Institute courses specifically structured in opportunities to discuss how they would take back and use what they learned. The small business technical assistance workshops included the Executive Director at the final of six sessions which helped to foster the environment for applying the lessons from the training. In other cases, sending more than one staff further facilitated the possibility of implementing change. In cases where the Executive Director or the supervisor was one of the participants along with other team members, interviewees noted an increased likelihood for applying the lessons once back at the organization.

Another factor that encouraged ongoing practice was the support provided to the staff member either from within the organization or from other sources. Two examples were mentioned during the interviews – the benefit of the MACDC peer support network to foster ongoing practice and improvement, and the availability of outside coaches. The latter occurred in a few instances, springing from positive interaction with the trainer who then continued contact and follow up consulting.

According to those interviewed, the most critical variable in facilitating practice once back at the organization was the alignment of the subject matter with the staff member's work. The closer the tie with something the participant was working on or a new endeavor the organization was undertaking, the greater the likelihood that the new skills would be immediately applied or adapted to local circumstances. For example, the small business technical assistance training

came a good time for several of the participants and leaders who were interviewed.

> "It sharpened how we look at job creation and job retention. The training was a good match, and good timing for other things we were doing. We were able to immediately apply what we were learning."

Others reported, however, that it was more difficult to make immediate use of the materials when the course was taken purely for professional development purposes and was not necessarily directly tied to their work.

5. <u>Job Performance in new practice areas improves</u>

Another component of the follow-up interviews was focused on identifying ways in which job performance improved. (This outcome was not included in the day-of-survey due to the longitudinal nature of the question.) While many of those interviewed felt it might be too early to know if there has been an impact on performance, others were emphatic that performance for themselves or their employees had improved.

> "There has been some positive impact for me. I have been inspired, refocused, and stimulated. I have a renewed sense of purpose. It has been revitalizing. Personally I can appreciate that it has had a positive impact on my work."

> "There is a high percentage in his individual performance improvement. On a scale of 1-10, his skills have improved by a 5-6. The trainings are helping to continue to build knowledge and skills. There was already something there… the trainings are adding more."

> "I'm not necessarily doing a better job day to day – it's been too short a time period – but it has given me a different perspective. The training helped me to see my service in a different way. I'm not just providing the assistance but looking at the big picture of what we are trying to accomplish."

> "Yes it has helped me in my job. The skills I learned that I didn't have before are applicable to this job and other jobs I'll have going forward."

> "Yes. There has been measurable progress that I had not seen before."

OUTCOMES FOR ORGANIZATIONS

The outcomes for organizations evaluated during the follow-up interviews include:

1. CDC applies and adopts best practices from training
2. CDC improves practices and becomes more effective organization
3. CDC increases ability to retain effective staff and attract new hires
4. CDC has articulated professional development plans
5. CDC increases awareness & ability to access appropriate training opportunities to best meet their needs

All of the above outcomes were evaluated during the interviews and were not included in the day-of-survey.

1. CDC applies and adopts best practices from training
2. CDC improves practices and becomes more effective organization

[Note: reporting on outcomes (1) and (2) are combined because responds were too closely linked to accurately report on them separately.]

Broad applicability and adoption of new practices was a consistent theme through the evaluation but varied depending on the nature of the course, its length, who attended, and the circumstances back at the organization. Consistent with the finding that individuals practiced new skills at a higher rate when closely tied to their immediate work tasks, organizations applied and adapted best practices when it was well aligned with their current activities. Furthermore, follow up and implementation was furthered in some cases by continued contact with the instructor who became a coach or advisor to the group. It was noted by several interviewees that more follow-up contact with trainers or coaches would be beneficial.

Implementation of new ideas was strengthened when more than one person attended and/or when the supervisor or Executive Director was in attendance for some or all of the session. By having the Executive Director attend the final of the 6-session small business training series, not only facilitated individual practice of the skills by others as was noted earlier, but it also meant that it was easier to implement change across the organization in adopting new practices. Organizational implementation was also furthered when more than one person from an organization or a department attended the training together. In addition to streamlining implementation of new ideas, attending the training with other people from the organization also led to greater team work.

> "By going to the training with a team from our organization, we were able to get on the same page, build a common language and stronger communication and team work between the members, and make it easier for us to implement changes when returning from the training."

Some examples of new approaches that were adopted include:

> "We took the idea of using one on ones and brought it to the entire team. Now everyone has a schedule of doing one on ones and we are reporting back to the group our progress."

> "We instituted a new intake process and form that lets us conduct an evaluation every time we counsel a client. It clearly outlines the outcomes achieved, next steps, and what we are going to continue to work on with the client. The training course helped us to implement this new evaluation and tracking system that is improving our work in the community."

> "We have been able to demonstrate to the organization the importance of the role of residents- putting a real face to our organizing work and that resident involvement is going to help the mission overall. This led to creation of a Residents Committee with board representation, and now the committee members are setting the agenda and running the meetings."

While it is clear from several examples that the training has had an impact on individuals and their organizations, many of those interviewed suggested that the Institute should consider ways to even further the impact on the organizational level. Based on the lessons learned to-date,

methods for doing so might include encouraging multi-staff teams to attend trainings together, include the Executive Director and/or supervisors when feasible, and work directly with Executive Directors to increase their understanding of the benefits of participation in King Institute workshops. Some suggested that the King Institute staff revisit organizations and meet with staff and board members to present the curriculum and the benefits of attending King Institute trainings.

> "Getting re-acquainted with the King Institute would ensure that everyone knows about what is available and might encourage more people to participate from within the organization."

It was also recommended that the King Institute export trainings to the local level to support full organizational participation. A package of trainings with discrete modules that could be purchased and tailored to local site conditions would encourage greater participation within each organization, and thereby facilitate deeper implementation. [Even those who suggested this notion cautioned that participants would miss the interaction with peers from other organizations, clearly seen as a benefit of the King Institute. These competing demands would need to be reconciled in the future.]

> "The King Institute should consider coming to individual CDCs and tailoring a training to the local situation. This way we could have the whole staff participate and the likelihood of implementing changes based on what we learned would be greater."

3. CDC increases ability to retain effective staff and attract new hires

In general, most interviewees thought it was too early to judge whether the trainings have had an impact on retention or recruitment. However, several people suggested this might be an outcome in the future, and a few people already stated seeing a benefit, especially for retention pertaining to younger staff members.

> "I had thought about further graduate studies, but I'm learning on the job, and going to these workshops and trainings… this helps me to stick around here and learn."

> "If we were not investing in her professional development, we would probably have lost her already."

> "MKI allowed us to hire people from the community because we knew we could send them to quality training to boost their skills."

To further directly help with recruitment, it was suggested that the Institute would need to have a full curriculum every year to become part of the 'benefit package.'

4. CDC has articulated professional development plans

Some CDCs already have an organized approach to professional development while others do not. For some groups, the availability of the King Institute and its diverse offerings has led to a greater investment in professional development.

> "The convenience and ease of access has sparked us to do more than what we have done in the past. We had been lacking a coherent plan around professional development. Now we are having a much more deliberate discussion around it, including creating budgets to pay for it."

The role of the King Institute in furthering professional development came up in many interviews, particularly in helping organizations to articulate a professional development plan and identifying the resources to implement it. Some suggested that the King Institute consider a concerted effort to reach out to Executive Directors to find out how it can be helpful in furthering their organization's professional development agenda.

> "The Institute can ask Executive Directors – in what areas do you need employees to improve skill sets and how can the King Institute help with this? The King Institute could help organizations identify professional development opportunities and a plan for how to implement to meet the organizations' goals."

5. CDC increases awareness & ability to access appropriate training opportunities to best meet their needs

There was unanimous praise for the Institute's ease of access and its impact on increasing awareness about high quality training programs.

> "The emails come out frequently but are not overwhelming. I know if it's coming from the King Institute, I pay attention to it because it is worth it."

> "Mel King Institute is a great resource. In the past I would get emails here and there. What I like about the King Institute is that they put it all under one umbrella. Now when I get the emails, it's all right there and I can forward it to staff who can directly sign up."

OTHER OUTCOMES

The outcomes pertaining to peer to peer interaction include:

1. Participants gain access to learning from and with peers
2. Sharing of skills/ knowledge, relationships among peers grows

Data for these outcomes were gathered both from the day-of-survey and the follow-up interviews.

1. Participants gain access to learning from and with peers

Day-of-survey Question #12: *During the training did you have an opportunity to work with peers that you found beneficial to your learning?* See Appendix 11 for the full report.

In Year Two, all but one person stated that there was either extensive work or some work with peers that was beneficial, with a slightly higher percentage who felt that there was extensive work with peers than those reporting in Year One. (Year One - 41% said extensive work with

peers was beneficial, 56% stated that some work with peers was beneficial, and 3% said that there was no work with peers that was beneficial.) However, the variations are minor, indicating that the King Institute courses consistently offer work with peers that is generally beneficial to the participants across all courses.

The courses in Year Two with the highest ranking on this question where more than 50% of the respondents said the work with peers was extensive were: Leadership Development for CD practitioners, Building Leaders: Building Communities, Small Business TA 5, Small Business TA 4, Urban and Regional Planning for Community Development Practitioners, Popular Education, and Basics of Community Organizing Social Capital.

Opportunity to work with peers that was beneficial

No work with peers that was beneficial
1%

Some work with peers that was beneficial
52%

Extensive work with peers that was beneficial
47%
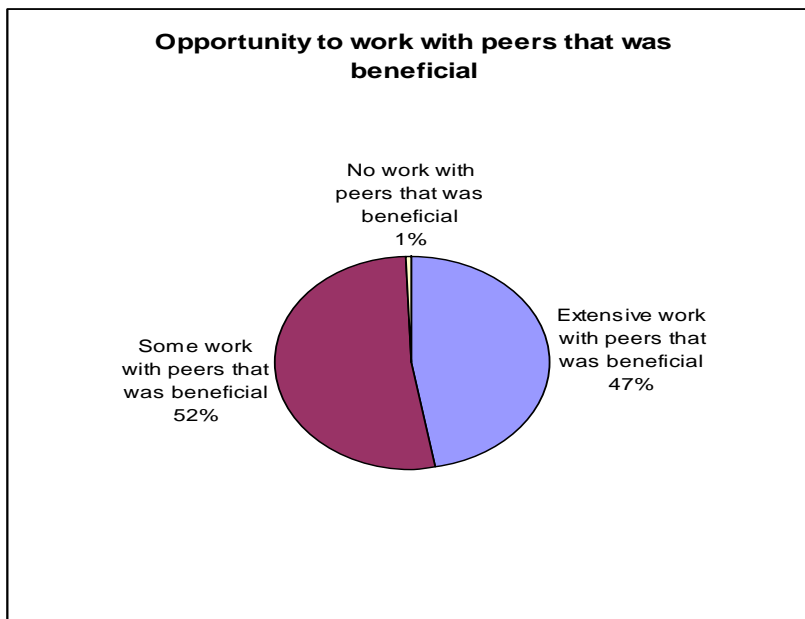
"By having frequent trainings provided strong relationships and sharing practices. Very supportive and useful, especially seeing people over time." *Small Business 5*

"I enjoy the day long peer groups. There is a lot of learning from the participants. I will miss this next year." *Small Business TA 6*

"I enjoyed the smaller group size; I learned from the staff at the other CDCs; I thought the "clinic" format was useful. Great job!" *Managing your Multi-Family Portfolio*

"It is always interesting to hear what issues people are facing in their own projects as well as what problems present themselves at different phases of a project. Hearing the experiences of my peers with respect to their own projects was a way to help anticipate many of the challenges that would be coming down the road on my own project." *LISC Project Manager Seminar*

The follow-up interviews confirmed that the trainings offer a quality means for sharing experiences with peers. This is true across the spectrum of types of trainings – for organizers, small business managers, real estate project staff, and others.

"Shared suffering is half suffering. We are not alone. A lot of us are facing the same dynamics and it is not as personal as it can feel."

"The learning is not only from the content but the ongoing relationships with peers and colleagues in the field."

"The benefit of these trainings is to hear about similar problems. At some other trainings, there is a tendency to paint the work as successful. Here we have more space to talk about challenges. It has helped to do the job better."

"Even though peers may not always have the answers, it is great to be able to talk with others struggling with this work."

2. Sharing of skills/ knowledge, relationships among peers grows

Day-of-Survey Question 13. *If you plan to follow up with any peers you worked with today to continue the learning process, please tell us how you might conduct that follow up and your timeframe.*

Many respondents indicated an interest in following-up with their peers after the workshop.

"I will contact peers in the coming months via email or phone with any questions I have regarding my project. Some in the group had faced problems down the road that I may need help with later on, so I would definitely contact them for advice in an area that I know they are already familiar with."

"I will tap into the student pool as the opportunity presents."

"I think that I will stay in touch with others that I met through the course on a casual basis to see how their projects are going."

"I found it very useful to meet other first time or new project managers and discuss projects and issues they were tackling. I would love it if the group continued to meet after the seminar is completed as I think it would be helpful for everyone to continue to have this support group and place to go for advice and help."

The follow up interviews indicated that many people actually did continue contact with their peers, especially through the current MACDC peer support structure. Peer contact at the training was very beneficial for all, but especially for the newer people in the field. Hearing what other people are doing, even if it isn't something they are working on right now, was appreciated and opened the door for further contact in the future. Several people noted that they met with individuals afterwards to share experiences, continuing learning, and to share resources.

"The current peer group model is effective. MACDC peer groups and MKI are a nice complement to each other – it 'creates connective tissue in between' the training sessions."

"Barriers to accessing peers were removed because she met them at the training."

Several people suggested that MACDC collaborate with the King Institute in the future to deepen the peer to peer interaction after the training, such as hosting peer groups for more experienced organizers, or for managers.

"In the future, it would be helpful to have peer groups with 'more meat on them' – taking the topics to the next level."

FUTURE TRAINING AND SERVICES

Participants responding to the day-of-survey and during the follow up interviews were asked about additional training or services to be offered by the Mel King Institute and to provide any other comments.

Additional training or services

Three areas were mentioned by a number of participants – more opportunities for peer groups and technical assistance, workshops that are more advanced on a variety of topics, and the opportunity for cross-training.

- **Working groups/ peer support/ technical assistance**: Participants see the value in working closely with their peers during and after the training session. Many of those already participating in the MACDC peer groups praised the format and access to peer sharing. It was recommended by several interviewees that the King Institute and MACDC consider how to deepen the peer support system by creating additional opportunities for more advanced peer interaction. Furthermore, providing access to technical assistance either from peers and/or from consultants may help with implementation. Ideas mentioned included incorporating a bank of hours for the consultant to offer as follow-up after the course or a series of two to three shorter workshops following the initial course for participants to come back together to share case studies and discuss how implementation is progressing.

  > "The King Institute has to define itself – is it going to do one-off training sessions or also add a technical assistance follow up component? The peer groups as they exist, as sponsored by MACDC are an excellent complement and do not need to be re-invented. However, there is a niche for follow up support either through one on one coaching or follow up sessions."

- **More in-depth courses**: While it is clear that the introductory courses should continue, many people also suggested that the King Institute examine how to offer more advanced, in-depth courses on various topics. Those mentioned for advanced level courses included: asset management for affordable housing, planning and zoning, collaborative planning processes (working with government), supervising organizers, project management, project financing, reading and creating financial reports, and popular education training.

- **Cross training**: Some interviewees suggested that the King Institute develop courses on key components of CDC work, i.e., community organizing and real estate development, for those within the organization who are not currently working in that field, such as a course in the basics of organizing for non-organizers and the basics of real estate development or other technical topics for non-real estate professionals. The level of training in these topics is too great now for people outside of the field. It would be

valuable to the overall organization if there were a one day training to broaden understanding of what the other parts of the organization are doing.

> "We get frustrated with each other because we don't understand each other."

> "Organizers aren't always seen in the correct light – they are perceived more as outreach workers, others don't understand the need to build relationships and the ground work needed. On the other hand, it would be very helpful if organizers understood the development process and had more empathy for the business side."

See Appendix 12 for a list of other topics mentioned for future training sessions.

Other comments

1. **Strengthen connection with academic institutions**: It was noted that this had been one of the goals of the King Institute but it is unclear whether much has occurred in this area. Possible endeavors could include joint research projects and other ways of being more intentional about how to use academia to benefit the field as a whole.

2. **Increase offerings focused on Boards of Directors**: More Board members attended during Year Two and a course was offered on Corporate Governance, yet this is still an area where additional training is warranted. Suggestions included: understanding finances and the board's role in overseeing finances, understanding real estate development, the science and theory behind individual donor giving, board/ staff relationships, and training focused for resident leaders in particular.

3. **Expand beyond CDCs**: It was noted that the King Institute has made an attempt to reach out beyond the CDC world but for the most part, some thought, this has not been successful. Bringing in community partners that are not CDCs would help overall community efforts, including those led by CDCs.

   > "They haven't been attracting the neighborhood based organizing groups for example (who work for non-CDCs). Either they should make a concerted effort to figure this out and do it, and then the curriculum would be different, or just drop it and focus on CDCs or CDC type groups."

4. **Consider the King Institute's relationship with other initiatives and other training programs:** It was suggested that the King Institute look into how it can collaborate with other training venues such as TDC. Moreover, the line between the King Institute and MACDC, and the various other initiatives it sponsors, is often blurred. In the case of the peer support networks, many thought the relationship was seamless and therefore effective. Some raised a concern about other initiatives being 'folded into' the King Institute – namely the Innovation Forum and The Alliance - Advancing Community Development by Confronting Racism – and thereby losing their own independent identities. With regard to the Alliance, it was suggested that the King Institute keep a continual thread of topics related to the issues of racial and ethnic inclusion, but they be co-branded or other techniques to retain the identity of the Alliance.

CONCLUSIONS AND RECOMMENDATIONS

In its second year of operations, the Mel King Institute for Community Building met nearly all of its planned outcomes and received high praise from participants across a spectrum of courses. Nearly 90% of the students submitted an evaluation at the conclusion of the course, a very high rate of return. By implementing a new evaluation methodology that sought follow-up responses from both participants and supervisors, the King Institute has been able to learn about its results from a longer vantage point. Several points are clear by looking at results from both the Year One evaluation and the Year Two evaluation:

- The King Institute continues to serve a relatively diverse audience of students across age, race, and geography.
- The quality of the instructors, the course material and curriculum, and the organization of the training programs are all rated as very high and praised as affordable and practical to immediate applicability.
- Nearly all participants reported that they gained access to applicable tools and knowledge, felt the course material was useful, and at the end of the course, thought that the new skills would be helpful in advancing professionally in the community development field.
- Many participants also reported that they were able to practice and apply the new knowledge to improve their performance and their confidence grew.
- Several CDCs have applied and adopted best practices in order to become more effective organizations.
- The existence of the King Institute and the ease of access to quality training programs prompted organizations to pursue professional development for their staff, which might not have occurred otherwise.
- The peer to peer interaction is beneficial and continues after the courses largely through existing MACDC peer networks.

To further strengthen the existing program, several recommendations were offered:

1. **Consider methods to closely match the content and rigor of the course with the expectations of the students**. This can be addressed through greater specificity in the course descriptions, prerequisite requirements, and/or direct communication with the students prior to the workshop. In addition, providing materials beforehand may enhance the impact of the course. In a series format, involving the participants in creating the agenda was seen as very beneficial to the course being targeted to exactly what people needed.

2. **Examine how to further increase impact at the organizational level**. It is abundantly clear that the King Institute is having an impact on the individuals who attend its courses. Many of those interviewed thought more could be done to deepen the benefit for organizations. Based on the lessons learned to-date, methods for doing so might include encouraging multi-staff teams to attend trainings together, include the Executive Director and/or supervisors when feasible, and work directly with Executive Directors to increase their understanding of the benefits of participation in King Institute workshops. It was also recommended that the King

Institute export trainings to the local level which would enable entire organizational participation.

3. **Consider its role in the field of peer support and technical assistance.** There is an apparent need for deeper and more advanced peer support, and for follow up technical assistance to individuals and organizations to help them implement the ideas they learned about in the courses. The King Institute may want to consider how it can work with MACDC and others to address this need.

4. **Review the list of recommendations for additional courses when developing the program for next year**. This should include considering their ability to offer more in-depth courses on a variety of subjects, and the possibility of developing a series of cross-training workshops for organizers, real estate developers, or others within the CDC.

5. **Continue to evaluate the audience served by the current courses and determine if this matches the Institute's goals**. Consider if other kinds of outreach is needed to increase participation from board members, or to achieve greater diversity of participants along various dimensions, types of organizations, or geographic distribution.

6. **Set a plan for evaluation for the third year of operations that builds from Year Two and is designed to answer any new questions it has for the coming year.**

Congratulations on another highly successful year of operations!

APPENDIX

Appendix 1	Follow up interviewees and courses
Appendix 2	List of courses evaluated in Year Two
Appendix 3	Participants by Race and Age
Appendix 4	Day-of-Survey Question 5 – Quality of Presenters
Appendix 5	Day-of-Survey Question 6: Rate the organization of the training
Appendix 6	Question 7: Rate access to the King Institute registration process
Appendix 7	Day-of-Survey Question 8: Did you learn about new tools or gain knowledge that is applicable to your position?
Appendix 8	Day-of-Survey Question 9: Degree of Usefulness
Appendix 9	Day-of-Survey Question 10: Do you believe that the skills or knowledge you gained today will help you to advance professionally in the community development field?
Appendix 10	Day-of-Survey Question 11: Examples of how participants envision applying the new skills or knowledge from the workshop.
Appendix 11	Day-of-Survey Question 12: During the training did you have an opportunity to work with peers that you found beneficial to your learning?
Appendix 12	Other topics mentioned for training opportunities

Appendix 1

Follow-up Interviewees (May-June 2011)
Allston Brighton CDC: MH Nsangou
JPNDC: Alison Moronta, Kyle Robidoux, Juan Gonzalez, Richard Thal
Chelsea ND: Cat Dodson Goodrich
Somerville Community Corporation: Cecily Harwitt, Jeremy Wilkening, Danny LeBlanc
Madison Park DC: Angela Kelly, Kevin Johnson, Harry Smith
Franklin County CDC: Amy Shapiro, John Waite
WATCH: Anne Schweitzer, Steve Laferriere, Erica Schwarz

Courses participants attended (or interviewed EDs where participants attended)
Nuts and Bolts of Asset Management (12/10/09)
Community Organizing 101 (12/16/09)
Raising the Standard for Small Business Technical Assistance (6 Sessions)
NeighborCircles (3/10/10)
Organizing 102 (4/13/10)
Nonprofit Housing Management Specialist (6/2/10)
Mixed-Use Real Estate Finance (9/14/2010)
Intro to Community and Economic Development (9/15/10)
Leadership Development Strategies (10/8/10)
Building Leaders, Building Communities (12/10)
Innovation Forum: How Community Development is Embracing Environmental Sustainability (12/2/10)
Group Facilitation (1/28/11)
Popular Education (4/7/11)

Appendix 2

Courses Evaluated in Year Two

Name of Course	Date/ Location	# Participants	# Evaluations
Small Business TA Seminar 4	7/10; Babson	10	9
Mixed Use Real Estate Finance	9/10; Framingham	23	17
Small Business TA Seminar 5	9/10; Babson	9	9
Community Development 101	9/10; Boston	12	11
Leadership Development Strategies for Community Development Practitioners	10/10; Lawrence	21	16
Urban and Regional Planning for Community Development Practitioners	11/10; Boston	16	12
Small Business TA Seminar 6	11/10; Babson	10	10
Managing your multi-family portfolio	12/10; Boston	6	6
Building Leaders; Building Communities	12/10; Worcester	25	23
Group Facilitation: Bringing Community Meetings to Life	1/11; Boston	22	17
Nonprofit Housing Management Specialist	2/11; Framingham	11	9
LISC Project Manager Seminar	2/11; Boston	6	6
Mat Thall CDC Real Estate Development	3/11; Boston	8	7
Understanding and controlling your program finances	4/11; Worcester	15	14
Introduction to Popular Education	4/11; Boston	16	13
Redeveloping Foreclosed Properties	5/11; Framingham & Boston	16	11
Basics of Community Organizing Social Capital	5/11; JP	15	15
Small Business Financial Analysis	6/11; Babson	15	15
Corporate Governance for CDCs and their Board Members	July 2011, Boston	7	7

Appendix 3

Course evaluation by race and age

Name of Course	# of Evals	Under 40	Over 40	White	People of Color
Corporate Governance for CDCs and their Board members	7	0%	100%	86%	14%
Small Business Seminar 5	9	11%	89%	89%	11%
Mixed Use Real Estate Finance	15	13%	87%	67%	33%
Small Business Seminar 6	8	13%	88%	88%	13%
Small Business Financials	15	13%	87%	80%	20%
Small Business Seminar 4	9	22%	78%	89%	11%
Nonprofit Housing Management Specialist	9	22%	78%	67%	33%
Redeveloping foreclosed properties	11	27%	73%	45%	55%
CDC Real Estate Development	6	33%	67%	17%	83%
LISC Project Manager Seminar	6	50%	50%	83%	17%
Urban and Regional Planning for Community Development Practitioners	12	50%	50%	58%	42%
Managing your multi-family portfolio	6	50%	50%	83%	17%
Community Development 101	11	64%	36%	55%	45%
Understanding and controlling your program finances	14	64%	36%	57%	43%
Leadership development strategies for community development practitioners	14	86%	14%	64%	36%
Building Leaders, Building Communities	23	83%	17%	65%	35%
Introduction to Popular Education	13	92%	8%	77%	23%
Group Facilitation	17	94%	6%	65%	35%
Basics of Community Organizing Social Capital	15	100%	0%	80%	20%

Appendix 4

Question 5: Rate the quality of the presenters	Strongly Agree	Agree	Disagree	Strongly Disagree
Managing your multi-family portfolio	100%			
LISC Project Manager Seminar	100%			
Leadership Development Strategies for Community Development Practitioners	94%	6%		
Group Facilitation: Bringing Community Meetings to Life	94%	6%		
Small Business TA Seminar 6	89%	11%		
Corporate Governance for CDCs and their Board Members	86%	14%		
Basics of Community Organizing Social Capital	80%	20%		
Small Business TA Seminar 4	78%	22%		
Introduction to Popular Education	77%	23%		
Urban and Regional Planning for Community Development Practitioners	75%	25%		
Mixed Use Real Estate Finance	72%	28%		
Mat Thall CDC Real Estate Development	71%	29%		
Small Business TA Seminar 5	67%	33%		
Nonprofit Housing Management Specialist	67%	33%		
Building Leaders; Building Communities	61%	39%		
Understanding and controlling your program finances	50%	50%		
Small Business Financial Analysis	47%	47%		7%
Community Development 101	45%	55%		

Appendix 5

Question 6: Rate the organization of the training	Strongly Agree	Agree	Disagree	Strongly Disagree
Managing your multi-family portfolio	100%	0%		
Leadership Development Strategies for Community Development Practitioners	88%	13%		
Corporate Governance for CDCs and their Board Members	83%	17%		
Small Business TA Seminar 4	78%	22%		
Nonprofit Housing Management Specialist	78%	11%	11%	
Urban and Regional Planning for Community Development Practitioners	75%	25%		
Basics of Community Organizing Social Capital	73%	27%		
Small Business TA Seminar 6	70%	30%		
Building Leaders; Building Communities	70%	26%		4%
Group Facilitation: Bringing Community Meetings to Life	69%	31%		
Small Business Financial Analysis	67%	33%		
Small Business TA Seminar 5	67%	33%		
Mat Thall CDC Real Estate Development	57%	43%		
Introduction to Popular Education	54%	46%		
Mixed Use Real Estate Finance	47%	53%		
Redeveloping Foreclosed Properties	45%	55%		
Community Development 101	45%	55%		
Understanding and controlling your program finances	43%	57%		

Appendix 6

Question 7: Rate access to the King Institute registration process	Strongly Agree	Agree	Disagree	Strongly Disagree
Corporate Governance	100%	0%	0%	0%
NHMS	88%	13%	0%	0%
Leadership Development for CD practitioners	71%	29%	0%	0%
Urban and Regional Planning for Community Development Practitioners	64%	36%	0%	0%
Building leaders: building communities	63%	31%	0%	6%
Understanding and controlling program finances	57%	43%	0%	0%
Group Facilitation	47%	53%	0%	0%
Small Business Financial Analysis	47%	53%	0%	0%
Popular Education	46%	46%	8%	0%
Redeveloping Foreclosed properties	44%	44%	0%	11%
Small Business TA 5	43%	57%	0%	0%
Community Development 101	40%	60%	0%	0%
Mixed Use Real Estate Finance	38%	56%	6%	0%
Small Business TA 4	22%	67%	11%	0%

Appendix 7

Q8: Did you learn about new tools or gain knowledge that is applicable to your position?	Yes	Somewhat	No
LISC Project Manager Seminar	100%	0%	
Small Business Financial Analysis	100%	0%	
Corporate Governance	100%	0%	
Basics of Community Organizing Social Capital	93%	7%	
Leadership Development for CD practitioners	93%	7%	
Popular Education	92%	8%	
Small Business TA 4	89%	11%	
Redeveloping Foreclosed properties	88%	13%	
Group Facilitation	88%	12%	
Urban and Regional Planning for Community Development Practitioners	83%	8%	8%
Community Development 101	82%	18%	
Small Business TA 5	78%	22%	
NHMS	78%	22%	
Mixed Use Real Estate Finance	76%	24%	
Mat Thall CDC real estate development	71%	29%	
Understanding and controlling program finances	71%	29%	
Small Business TA 6	70%	30%	
Building leaders: building communities	70%	30%	

Appendix 8

Question 9: Degree of Usefulness	Extremely useful	Useful	Somewhat useful	Not at all useful
LISC Project Manager Seminar	92%	8%	0%	0%
Managing your multi family portfolio	71%	29%	0%	0%
Community Development 101	60%	33%	7%	0%
Planning for Community Development Practitioners	60%	31%	9%	0%
Leadership development for CD Practitioners	58%	40%	3%	0%
Group Facilitation	58%	35%	7%	0%
Basics of Community Organizing Social Capital	56%	37%	7%	0%
Building leaders: building communities	55%	37%	7%	7%
Small Business TA 6	53%	18%	18%	13%
NHMS	49%	46%	6%	0%
Small Business TA 4	49%	40%	11%	0%
Popular Education	48%	43%	9%	0%
Mat Thall CDC real estate development	46%	43%	11%	0%
Understanding and controlling program finances	36%	46%	15%	2%
Mixed Use Real Estate Finance	35%	50%	15%	0%
Small Business TA 5	28%	59%	11%	2%

Appendix 9

Question 10: Do you believe that the skills or knowledge you gained today will help you to advance professionally in the community development field?	Yes	Somewhat	No
Leadership Development for CD practitioners	100%	0%	
Managing your multi family portfolio	100%	0%	
NHMS	100%	0%	
Mat Thall CDC real estate development	100%	0%	
Corporate Governance	100%	0%	
Group Facilitation	94%	6%	
Building leaders: building communities	91%	9%	
Small Business TA 5	89%	11%	
Small Business TA 4	88%	12%	
Small Business Financial Analysis	87%	7%	6%
Redeveloping Foreclosed properties	80%	20%	
Basics of Community Organizing Social Capital	79%	21%	
Urban and Regional Planning for Community Development Practitioners	75%	25%	
Community Development 101	73%	27%	
Understanding and controlling program finances	71%	22%	7%
Small Business TA 6	70%	20%	10%
Popular Education	69%	31%	
Mixed Use Real Estate Finance	59%	41%	

Appendix 10

Day of Survey Question 11: Examples of how participants envision applying the new skills or knowledge from the workshop.

Small Business TA 4
- To support business owners in analyzing their business and to develop an execution strategy
- Developing TA programs
- Once templates are revised this will be very useful
- Tools for businesses who use our services. Also useful for start-up businesses

Small Business 5
- Working on strengthening and deepening relationships with lenders having a better idea of what additional information I need
- Meeting more lenders, exploring how to use SBA programs, develop tool of matrix of lenders (industry specific), do more with debt ratios
- Better knowledge of other loan program criteria and resources to navigate around them when needed
- I think I have a better idea of how I can make the SBA district office work for me and make my life easier

Small Business 6
- New approaches to fundraising/ marketing and promotion
- Messaging and Measurement
- Rethinking the organizational approach after major staff changes
- We will be finding a way to improve outcome measures; I also think the involvement of senior staff was very useful in getting changes we can implement

Mixed Use Real Estate Finance
- Will certainly utilize course materials after the session
- The material covered will enhance my day to day obligation as it relates to business transaction, and recording of such through the organizational records
- This will be extremely helpful in evaluation, policy, regulation and the development of new programs for our local housing and economic development goals
- Enhance my day to day obligations as it relates to business transactions and organizational

Leadership Development Strategies for Community Development Practitioners
- I am contemplating formalizing our pantry volunteer process so that they can take on more responsibility and we can better recognize their efforts
- Be a more diverse and successful organizer
- Improve our leadership networking and tracking

- FCDC has a good foundation involving many community members, will try to get more organizational buy-in to invest time & support for more formalized leadership development
- See if my organization could do some of its own outreach in teaching about IDAs/Matched savings accounts
- I feel more energized to start more formal leadership training in my organization and really focus on the skills of our current and potential leaders
- Hope to improve my own leadership skills as well as continuing to push my organization to incorporate it more into our culture, to create an organizational environment conducive to leadership development
- Encourage deliberate, sustainable leadership development think about welcoming language and space
- Changing training from education focus to leadership opportunity reexamine entry points and how to develop more

Community Development 101
- Asset mapping
- Having a greater awareness of the history of CDCs and various conceptions of their roles in the community will give me a new understanding of the significance of the work I am doing
- It enabled me to see the bigger picture outside of my personal work to see what kind of impact my efforts can make
- It provided a solid context for my work and the field, allowing me to better plan my future in the sector
- Being able to better perform my responsibilities
- More knowledge about community development, outsider's perspective

Planning for Community Development Practitioners
- Greater confidence in technical understanding I already have. Greater awareness of other ideas and approaches
- Nice refresher and networking opportunity
- Adding a new element of understanding of the built environment
- We are in the beginning of a planning process now. Good refresher course and motivation.
- It helped to put the whole planning system for Boston and Massachusetts into perspective
- More detailed background in zoning and planning
- This was a great introduction to the basics of the field and extremely beneficial to someone like myself who is just beginning professional development.

Managing your multi-family portfolio
- Develop asset management plan, take steps to meet benchmark goals.
- Utilizing the spreadsheet for tracking portfolio, relying on slide presentation to develop strategies for improving project performance.
- Look at performance portfolio-wide instead of individually. I have more skills and knowledge in general.

- To be a manager of our properties, including creating asset management plans for each property.
- I will use the property performance worksheet to trend the performance of the properties.

Building leaders, Building communities
- Different methods for working with, recruiting, and maintaining leaders
- Organize a neighborhood watch type coalition
- Help enact programs more effectively
- Gives me a concrete tool to present to identified leaders
- I hope to use the resources in the book for training and reflection activities, adapting them to fit my "residents" needs
- Coordinating resources for residents
- Empowering and communicating with local youth
- Facilitation techniques
- I plan on using the ability to quickly make and implement plans and goals to speed up facilitation work in the office
- Better Facilitation in meetings and new opportunities for engagement

Group Facilitation
- I will use these exact techniques in some of my work
- Very relevant to my community organizing and outreach meetings
- Better structure and activities to improve conversations and overall meeting effectiveness
- Apply this knowledge to organize and run more effective meetings so our CDC members gain more from participating
- Completely re-imagine and reorganize my meetings to make them more dynamic
- The next meeting for the cultural competency group - I will make an agenda and push forward with a more structured meeting
- I can directly use the suggested ice breakers
- Defining the clear components of each meeting and using springboard activities to initiate conversation
- I really underestimated the creativity that can happen with community meetings

NHMS
- Will help me evaluate an asset manager I hire.
- Reporting and summarizing information.
- Better reporting (clear!). More reporting.
- I will be able to review financial information from a new view point and with a new understanding.
- Improve basic reporting, coordinate property and asset management better, better planning
- To work on roles of asset management and property management.
- Hoping to communicate better with staff a plan to improve our existing portfolio and collaborate more on the initial planning stages of proposed properties. Hoping to improve communication with 3rd party management in out LIHTC project.

LISC Project Manager Seminar
- I gained an overall understanding of the development process from start to finish. I also gained a better understanding of what other projects may go through and the issues that arise for them.
- Project planning; roles and responsibilities; community awareness issues
- I have a better understanding of how to negotiate architect and GC contractors. I have a better understanding of LIHTC budgeting.

Understanding and controlling your program finances
- More confidence in the budget review process
- Paying more attention to how my budget fits into agency budgets, reading agency audits
- implementing new skills into my program budgets
- I plan to engage my department staff in my next budget process
- I feel more confident analyzing budgets and hope to encourage other board members to better understand as well
- Better understanding of program managers role in respect to agency budgets
- I'm less fearful of the budget process
- Merging outcomes with financials to strengthen our outcome stories

Intro to Popular Education
- Creating more opportunities for others to lead
- Community based planning projects
- As a way to get my resident run committee to take ownership over the process
- We will adapt and apply several of these techniques to better engage residents/meeting participants
- Community Meeting facilitation
- More awareness of learning styles and leadership styles when speaking/meeting with community leaders
- This will come in handy for my first time home buyer classes
- Reminded me to constantly assess learning/teaching process, participant needs, interest level, and understanding
- I may use some of the activities in financial education classes
- Leadership Styles and the 12 step/principles of designing an exercise
- In developing leadership trainings this was an important push for inclusive trainings

Redeveloping Foreclosed Properties
- Improved confidence by meeting with peers
- Adjusting our organizational approach to foreclosure based on input from others
- Working closer with CHDOs, city planning department, and inspectional office
- Need to be proactive in meeting with local partners so we all have a vested interest on the outcome
- Improve efficiency and scope of our foreclosure program

Small Business Financial Analysis
- Provide better and more thorough financial analysis for clients

- More effective work with clients
- Applicant analysis for our new micro business program
- Creating new business plans and annual revenue analysis
- Better services to clients and community. Better steps toward our mission
- Increase production and deliberate client services
- Helping some existing clients prepare to take their business to the next level and get preapproved for financing
- Useful tool for evaluating the quality of individual borrowers in our portfolio
- Will be a helpful with loan and small business clients in stabilizing and growing their business
- I may try using it with our corporate members

Corporate Governance
- Reviewing some policy issues
- Share these details with other board members and staff
- Review our policies and bylaws, and board composition

Social Capital
- More careful planning, discussions w/ my supervisor
- I would like to learn more about members of my community and be able to develop smaller action steps with them
- Difference models are very helpful for planning future campaigns/initiatives. The framework will help with my outreach
- Although I don't necessarily believe that community organizing is something I see for my future, the techniques outlined will be helpful working with youth
- Networking and communication skills I will use, I realize how important it is to make connections in the community.
- Will help focus projects/goals/strategies, simplify tasks
- Use skills of people you work with, utilize peoples strengths
- Coordinating our individuals with developmental disabilities to become a force/tool in campaigns

Appendix 11

Q 12: During the training did you have an opportunity to work with peers that you found beneficial to your learning?	Extensive work with peers that was beneficial	Some work with peers that was beneficial	No work with peers that was beneficial
Leadership Development for CD practitioners	79%	21%	
Building leaders: building communities	74%	26%	
Small Business TA 5	67%	33%	
Small Business TA 4	63%	38%	
Urban and Regional Planning for Community Development Practitioners	58%	42%	
Popular Education	54%	46%	
Basics of Community Organizing Social Capital	50%	50%	
Group Facilitation	47%	53%	
Understanding and controlling program finances	36%	64%	
Mixed Use Real Estate Finance	35%	65%	
Community Development 101	33%	67%	
Small Business TA 6	30%	70%	
Mat Thall CDC real estate development	29%	71%	
Redeveloping Foreclosed properties	27%	73%	
Small Business Financial Analysis	20%	80%	
Corporate Governance	17%	67%	17%

Appendix 12

Other topics mentioned for training opportunities

Tenant/ community organizing and leadership development
- Starting a tenant association, fundraising, managing volunteers, any professional development
- Turning meetings into action
- Long term project planning; Door knocking planning
- Measuring outcomes of organizing
- How to work with community leaders to get their voice heard
- Organizing young people
- Connecting homebuyer programs to an understanding of leadership development and organizing

Real estate development, property management, asset management
- A hands on walk through with a final product at the end. More links to tools and objective stats
- Understanding the BRA. Overcoming power inequalities in development
- Leasing training.
- Remainder of CHAM Asset Manager curriculum
- 1 day property management "refresher"
- Affordable Housing Asset Management.
- Basic training on tax credits.
- Land bank community approach to foreclosures from the national perspective
- Understanding your role as an owner of housing in the community development context

Community and Economic Development

Small business development
- How to be more effective supporting business owners to implement change
- How to create a sustainably funded business TA program. Individually and MACDC wide
- More small business

Race relations and cultural competencies
- Undoing Racism (as a regular offering)
- Cultural competency in community organizing
- Racial and ethnic inclusion

Working with people
- Conflict resolution
- Problem solving
- Volunteer leadership development, Effective feedback and evaluation, conducting focus groups

- Managing volunteers

Board development
- Youth development & Board members
- Working with Board members, volunteers, and funders

Organizational change
- How to effect changes within an organization and get Board buy-in
- How to get your staff and organization to buy-into new concepts and structures

Computer skills
- Excel, advanced powerpoint/publisher

Fundraising
- Grant Finding and writing
- Instilling the culture of individual donor development for all staff

Finances
- How to read your organization's audit.

Staff development and supervision
- Basics of supervision; managing staff
- Goal setting with staff
- Communication with staff (as a supervisor)
- Evaluating staff performance
- Strategic planning for teams around creating and monitoring workplans
- How to create a learning environment

Other
- Any trainings related to program/project management (non-real estate)
- Coaching on how to be more effective with motivating change in our clients served
- Lobbying law workshop
- Public speaking 101, Persuasive speaking
- Strategic thinking
- Workshop on grassroots media
- Training for trainers
- More courses for business people, financial managers, CFOs