# PROGRAM EVALUATION MEMO:
# 2016 COHORT

## EXECUTIVE SUMMARY

The data and analysis presented in this memo reflect the results of a comprehensive evaluation of the Human Rights Campaign (HRC) Foundation's HIV 360° Fellowship Program in 2016. Made possible with the generous support of the Elton John AIDS Foundation, HIV 360° seeks to equip young, non-profit leaders with the knowledge, skills, and self-confidence needed to take HIV-inclusive organizations and initiatives to the next level in terms of their impact on the epidemic. The overarching goals of the program in 2016 were to:

- Improve fellows' non-profit management skills;
- Increase fellows' leadership self-efficacy;
- Create an informal peer-to-peer support network

Various assessments were administered over the course of the nine month-long program to gauge the program's effectiveness in facilitating the acquisition of certain core competences and related skills among the fellows. The 2016 program's core competencies were:

- Leadership - Ability to inspire and guide others toward a positive outcome
- Purpose – Ability to conceive of and align a mission and vision
- Strategy - Ability to devise goals, tactics, and objectives
- Execution - Ability to meaningfully plan, implement, and evaluate
- Partnership & Collaboration - Ability to work with others toward a common goal
- Marketing & Communication - Ability to craft and convey a message to multiple audiences across different contexts
- Finance & Development - Ability to generate and steward resources
- Sustainability - Ability to endure and maintain a resilient organization

In 2016, the HRC Foundation selected 10 fellows from a highly-qualified pool of 89 applicants living in more than two dozen states. Of the nine fellows who completed the program in December 2016:
- 8 identified as LGBTQ
- 6 identified as people of color
- 7 live or work in the U.S. South

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# HIV 360° Fellowship Program
## HUMAN RIGHTS CAMPAIGN FOUNDATION

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The key findings are as follows:

1. **The fellows demonstrated strength in their acquisition of technical skills, exhibited through their performance on their Community Service Projects (CSP)**. In order to graduate from the program, the 2016 fellows were asked to design, implement, and evaluate a CSP that would reduce the burden of HIV in their respective cities and towns. A complete CSP proposal included a grant application, budget, logic model, and environmental scan, all of which were used to assess the fellows' strength in the areas of Strategy, Purpose, as well as Finance and Development. In these three areas, the fellows scored between "Adequate" and "Exemplary." They were also the areas in which the cohort scored highest across all eight core competencies.

2. **The fellows displayed confidence and expressed an increased sense of self**. While Leadership as a skill-based competency produced lower than expected results at the end of the fellowship program, the 2016 fellows acknowledged an understanding of and appreciation for emotional leadership, which is consistent with expected short-term outcomes of the program.

3. **As a cohort, the fellows seemed to form genuine bonds and establish a solid peer-to-peer support network**. Several cited the cohort as a particularly valuable part of HIV 360° Fellowship Program, and many identified self-care as a skill explored throughout the program that will improve their ability to prevail when faced with adversity and sustain their efforts as leaders in the HIV and AIDS space.

4. **Versus a peer control group, the fellows seemed to expand their comprehension of "leadership" beyond technical skills to include non-technical skills such as emotional leadership and authenticity (i.e., bringing one's authentic self to the work).** A quasi-experiment compared essay responses written by the fellows before and after the program with essay responses written by program finalists (i.e., fellowship applicants who advanced to the final round but were ultimately not selected to participate) during the selection process (i.e., before the program began) and once again after the program concluded. Both groups responded to the same essay prompt.

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5. **The 2016 cohort generally proves to be a group of 'Achiever' leaders driven by results and focused on success as understood through 'Transformations of Leadership' theory.** The 2016 fellows show strong potential for becoming more sophisticated leaders, leveraging their personal strengths and relationships, challenging assumptions, and working for organizational and systemic change.

6. **Feedback shared by the fellows throughout and at the end of the program suggests participants were very satisfied with the structure and content of the fellowship program.** Their feedback indicates overwhelmingly that the 2016 fellows feel as though they improved their non-profit management skills, increased their confidence in their ability to be a leader, and became part of an informal, peer-to-peer support network after participating in the HIV 360° Fellowship Program.

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### BACKGROUND

Community-based, non-profit organizations play an important role in meeting the needs of the communities most impacted by HIV and AIDS in the United States, including lesbian, gay, bisexual, transgender, and queer (LGBTQ) people.[12] At the same time, the landscape in which many of these organizations find themselves has changed drastically in recent years, leaving many of them vulnerable to the risk of becoming ineffective or obsolete because of an inability to adapt.[3] Organizations whose leaders may be young and passionate but inexperienced in the ways of effective non-profit management are particularly vulnerable to this danger. These factors underscore the need to develop a generation of knowledgeable and self-confident leaders skilled in the ways of effective non-profit management.[4]

The Human Rights Campaign (HRC) Foundation's HIV 360° Fellowship Program provides a unique opportunity for non-profit leaders under the age of 35 to develop the skills and leadership self-efficacy needed to increase the capacity and maximize the effectiveness of HIV-inclusive organizations and initiatives. The program aims to achieve this goal by:
- Improving fellows' non-profit management skills;
- Increasing fellows' leadership self-efficacy;
- Creating an informal peer-to-peer support network

The program is rooted in Alan Bandura's social learning theory (SLT), which posits that learning takes place in a social context and can occur purely from observing the actions of other people or through direct instruction.[5] According to Bandura, "most human behavior is learned observationally through modeling: from observing others one forms an idea of how new behaviors are performed, and on later occasions this coded information serves as a guide for

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[1] Coates et al, "Leadership Development and HIV/AIDS," National Institutes of Health, last accessed August 5, 2016, http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2810248/?report=classic.

[2] "Sector Transformation," AIDS United, last accessed August 5, 2016, http://www.aidsunited.org/data/files/Site_18/AU-SectorTransformation2015_Final.pdf.

[3] Ibid.

[4] Coates et al, "Leadership Development and HIV/AIDS."

[5] Kendra Cherry, "What is Social Learning Theory?," VeryWell, last accessed August 5, 2016 https://www.verywell.com/social-learning-theory-2795074.

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action."[6] The program draws upon SLT by using observation and direct instruction to help improve fellows' non-profit management skills and to increase their leadership self-efficacy, or "a person's confidence in [their] abilities to successfully lead a group."[7] Leadership self-efficacy has consistently been shown to contribute to leadership effectiveness.[8][9]

## PROGRAM OVERVIEW

Made possible with the support of the Elton John AIDS Foundation, the program selects young people, under the age of 35, holding influential positions in HIV-inclusive organizations and initiatives throughout the U.S. Over the course of nine months, the 2016 fellows received customized leadership and organizational development training, coaching and technical assistance, financial support (up to $10,000 per fellow), and opportunities for strategic partnership and collaboration with the HRC Foundation. In return, the 2016 fellows were expected to take part in a 'Request for Proposals' process during which they designed, implemented, and later evaluated a grant-funded community service project (CSP) focused on reducing the burden of HIV in their respective cities and towns. The 2016 program was run at no-cost to fellows or their organizations and was administered by the HRC Foundation in Washington, D.C.

The 2016 program supported the fellows in developing eight core competences of non-profit management: Leadership, Purpose, Strategy, Execution, Partnership and Collaboration, Marketing and Communication, Finance and Development, and Sustainability. The program facilitated the acquisition of these core competences related skills through a 5-day-long retreat in April focused on leading people and organizations; a 3-day-long retreat in June focused on

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[6] Alan Bandura, "Social Learning Theory," last accessed August 5, 2016, http://www.esludwig.com/uploads/2/6/1/0/26105457/bandura_sociallearningtheory.pdf.

[7] McCormick et al, "Extending Self-Efficacy Theory to Leadership: A Review and Empirical Test," Journal of Leadership Education, last accessed August 5, 2016, http://leadershipeducators.org/Resources/Documents/jole/2002_winter/JOLE_1_2_McCormick_Tanguma_Lopez-Forment.pdf.

[8] Chemers et al, "Dispositional Affect and Leadership Effectiveness: A Comparison of Self-Esteem, Optimism, and Efficacy," Personality and Psychology Bulletin, last accessed August 5, 2016, http://psp.sagepub.com/content/26/3/267.abstract.

[9] Murphy et al, "The Effects of Leader and Subordinate Characteristics in the Development of Leader–Member Exchange Quality," Journal of Applied Psychology, last accessed August 5, 2016, http://onlinelibrary.wiley.com/doi/10.1111/j.1559-1816.1999.tb00144.x/abstract.

making, measuring, and maximizing impact; and a 3-day-long retreat in December focused on sustaining the work ahead. Additionally, in between each retreat, fellows were given reflective assignments, peer networking opportunities, and direct access to leading experts in the field of HIV prevention, treatment, and care. The program was designed this way in light of research demonstrating the connections between these types of programmatic offerings and increased leadership self-efficacy.[10]

In 2016, The HRC Foundation selected 10 fellows from a highly-qualified pool of 89 applicants living in more than two dozen states. Of the nine fellows who completed the program in December 2016:

- 8 identified as LGBTQ
- 6 identified as people of color
- 7 live or work in the U.S. South

## METHDOLOGY

To establish the 2016 cohort's baseline levels of competency, a 360° leadership assessment and a self-reported organizational capacity assessment were administered at the start of the program. Fellows' responses to essay questions in their fellowship application were also captured as a pretest measure. These instruments were administered again at the end of the program to produce a pre- and post-program comparison, which was relied upon to estimate each Fellow's growth as a result of the program.

A series of tests were administered throughout the program to assess the Fellows' understanding of new concepts and skill development. The most considerable of these tests was the HIV 360° 'Request for Proposals' process that asked each fellow to design, implement, and later evaluate a community service project (CSP) that seeks to reduce the burden of HIV in their respective cities and towns. The fellows submitted their CSP proposals and budgets to the HRC Foundation for final approval, at which point they were each given up to $9,000 in mini-grant funding to pilot their respective projects. The CSP proposals were also used to assess the fellows' strength in a number of the previously identified core competencies. So too was a final presentation on the

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[10] Tena Versland, "Exploring Self-Efficacy in Education Leadership Programs What Makes the Difference?," Journal of Research on Leadership Education, last accessed August 5, 2016, http://jrl.sagepub.com/content/early/2015/12/20/1942775115618503.abstract.

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results of their pilot projects at the December skill-building retreat focused on sustaining the work ahead.

Beyond these tests, the program evaluation also included data from observing the fellows' interactions at the three retreats as well as on social media, from reflective essays and other written assignments, and from a control group quasi-experiment that compared essay responses written by the fellows before and after the program with essay responses written by program finalists (i.e., fellowship applicants who advanced to the final round but were ultimately not selected to participate) during the selection process (i.e., before the program began) and once again after the program concluded. Both groups responded to the same essay prompt. Finally, the 2016 cohort shared their thoughts on the program's facilitation, content, and logistics through online surveys administered following each skill-building retreat.

### CONSIDERATIONS & LIMITATIONS

A number of limitations concerning this evaluation are worth highlighting before the discussion of findings. First, it is important to note that this was the first year of the HIV 360° Fellowship Program, which means several elements of the program and its evaluation were experimental by design. Some of the data are self-reported, and results from leadership assessments done before and after the program suggest the fellows and their external reviewers may have raised their expectations of what constitutes a "good leader" between the pre- and post-program surveys. Taken together, these factors introduce a degree of subjectivity that reduce the reliability of the resulting calculations.

Second, it was only realized fairly far along into the program that opportunities for measuring certain competencies (e.g., Execution, Partnership & Collaboration, Marketing & Communication, Sustainability) were not built into the program design per se, or those that were, were not optimally constructed for assessment.

Third, the program's expected outcomes were centered on increased awareness, attitude, knowledge, and skill level. It is impractical to expect to see significant shifts in behavior (i.e., Fellows consistently putting these new skills to work or dramatic shifts in organizational effectiveness) in less than a year. Instead, evaluations done before, during, and immediately after the first year of the program should look for evidence of conceptual understanding and

early-stage development, which is what this report details. The 2016 Fellows will stay connected to the HRC Foundation to validate longer-term developmental outcomes.
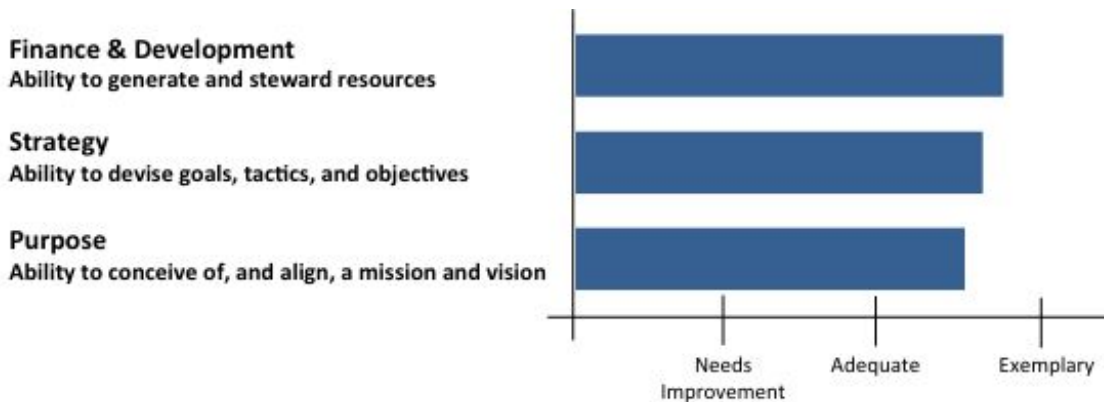
**KEY FINDINGS**

- **FINDING 1:** Fellows demonstrated strength in their acquisition of technical skills, exhibited through their performance on their Community Service Projects (CSP).

In order to graduate from the program, the 2016 fellows were asked to design, implement, and later evaluate a CSP that would reduce the burden of HIV in their respective cities or towns. A complete CSP proposal included a grant application, budget, logic model, and environmental scan, all of which were then used to assess the fellows' strength in the areas of Strategy, Purpose, as well as Finance and Development. In these three areas, the fellows scored between "Adequate" and "Exemplary." They were also the areas in which the cohort scored highest across all eight core competencies. Indeed, seven (7) of the nine (9) fellows earned an "Exemplary" rating on their CSP budget, and only one (1) Fellow received a rating of "Needs Improvement" on any of the assessments associated with the CSP proposal process.

This grading was reinforced by the fellows' own assessment of their growth areas. For example, whereas fundraising was one of the improvement areas cited by fellows' coming into the program (April), it was not among the areas mentioned at the close (November). Fellows also identified visioning and goal setting among their strengths both before and after the fellowship, which is consistent with their impressive results in Strategy and Purpose, as seen in Figure 1.

**Figure 1: Strength of Fellows' Core Competencies**
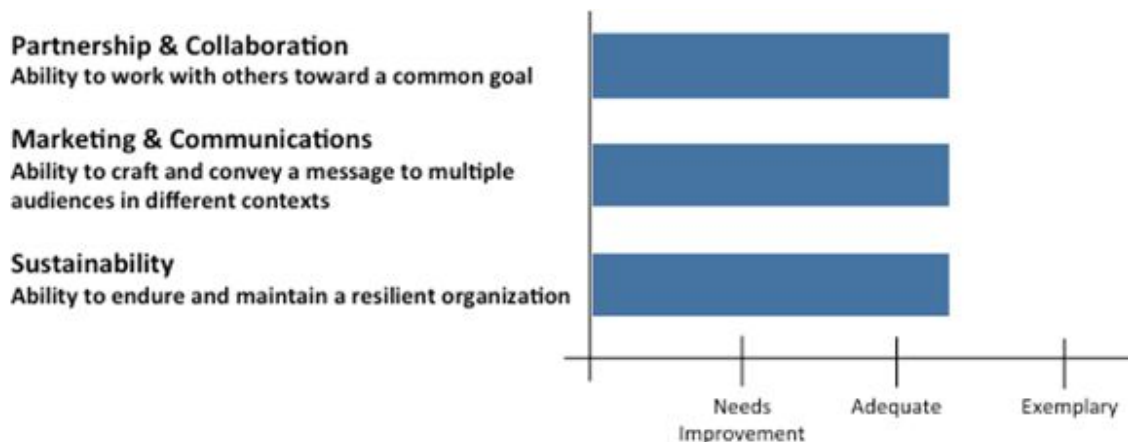


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While measures for Partnership & Collaboration, Marketing & Communication, and Sustainability were found to be more subjective and less technical than other components of the evaluation, the fellows were still able to demonstrate their acquisition of such skills through written tasks and reflective essay assignments as well as through certain elements of their CSPs. These data are reflected in Figure 2.

### Figure 2: Strength of Fellows' Core Competencies

**Partnership & Collaboration**
Ability to work with others toward a common goal

**Marketing & Communications**
Ability to craft and convey a message to multiple audiences in different contexts

**Sustainability**
Ability to endure and maintain a resilient organization

Needs Improvement | Adequate | Exemplary

- **FINDING 2:** Fellows displayed confidence and expressed an increased sense of self.

From April (pre-test) to November (post-test), only two (2) of the fellows improved their Quartile 1 count (i.e., the number of questions on the Rockwood Leadership 360° Assessment[11] where the participant's feedback score ranked in the top quartile versus all others who have completed the assessment – the benchmark). Surprisingly, six (6) of the fellows' Quartile 1 count declined during the program, and one (1) remained the same. One hypothesis for this seeming decline is the likelihood of raised expectations among both the fellows' and the people who scored them via the Rockwood 360° assessment. It is possible that reviewers expected to see a more significant improvement in skills over the fellowship period and graded accordingly. Moreover, at least two (2) of the fellows had a slightly different pool of reviewers in November than they did in April, which may also explain the reported decline.

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[11] "Art of Leadership," Rockwood Leadership Institute, last accessed February 21, 2017, http://rockwoodleadership.org/art-of-leadership/.

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On the specific questions of whether the Fellows inspire the best in others, and whether they are confident in their own leadership abilities, the results are stable. The fellows scored well on both indicators at the start of the fellowship and maintained this confidence through the end of the program. Indeed, while Leadership as a skill-based competency produced lower than expected results at the end of the fellowship program, the 2016 fellows acknowledged an understanding of and appreciation for emotional leadership, which is consistent with expected short-term outcomes of the program.

- **FINDING 3:** As a cohort, the fellows seemed to form genuine bonds and establish a solid peer-to-peer support network.

Following the first retreat in April focused on leading people and organizations, one fellow said in their evaluation that "it really helped to establish guidelines and ground rules on the first day of our fellowship. This collaborative discussion ensured that we were respectful to each other, and it also meant we were able to be more productive with our time together." The fellows expressed similar sentiments throughout the program, and all of them reported feeling connected to a peer-to-peer support network following the end of the program in December 2016. These data are reflected in Figure 3.

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**Figure 3: Degree to Which Fellows Feel Part of a Peer-to-Peer Support Network**
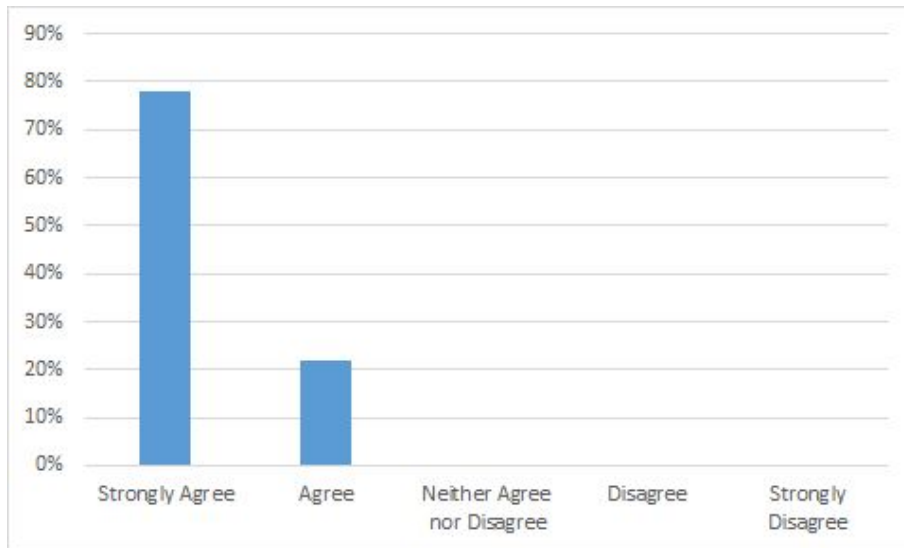


Moreover, when asked to provide a summary of their fellowship experience shortly after completing the program, at least eight fellows described the cohort in overwhelmingly positive terms, and several described it as one of the most valuable parts of the process. For example, one fellow said: "The experience most valuable for me would the be the cohort of new friends I have made. They are now family to me and I was able to learn something from each person in the cohort as well as learn more about myself.  The value of these relationships made every retreat, conference call, late night, etc worth it all." Another said: "Of course, one of the most valuable things about this program was my cohort. They have been so supportive, gracious, generous, knowledgeable and forthcoming with their time, emotionality, and energy. I truly treasure these folks and hope in 2017 I can do a better job of supporting them the way they've supported me." Finally, many of the fellows identified self-care as a skill explored throughout the program that will improve their ability to prevail when faced with adversity and sustain their efforts as leaders in the HIV and AIDS space.

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- **FINDING 4:** Versus a peer control group, the fellows seemed to expand their comprehension of "leadership" beyond technical skills to include non-technical skills such as emotional leadership and authenticity (i.e., bringing one's authentic self to the work).

A quasi-experiment compared essay responses written by the fellows before and after the program with essay responses written by finalists (i.e., fellowship applicants who advanced to the final round but were ultimately not selected to participate) during the selection process (i.e. before the program began) and once again after the program concluded. Both groups responded to the same essay prompt.

Upon entering the program, the fellows identified leadership and visioning among their greatest strengths while the finalists focused more on tactical strengths such as communication and program execution. This helps explain why the fellows were ultimately selected for the program: they are a group that, coming into the fellowship, had a more sophisticated understanding of both their role in the community and the work they do.

When asked the same question about strengths and weaknesses at the end of the program, the fellows acknowledged a need for continued skill-building in some of the more technical areas but identified their ability to empathize as a key leadership strength developed as a result of the program. The finalists, on the other hand, remained focused on more tactical skills, which suggests that the finalists continue to see their role as more of a contributor to, rather than a leader in, this work. These data are reflected in Figure 4.

**Figure 4: Fellows' Strengths & Weaknesses Compared to Finalists**

| | Fellows | | Finalists | |
|---|---|---|---|---|
| | Pre-Fellowship | Post-Fellowship | Pre-Fellowship | Post-Fellowship |
| Strengths | ● Partnership/collaboration<br>● Community engagement<br>● Community mobilization<br>● Visioning<br>● Leadership | ● Policy change<br>● Visioning<br>● Empathy | ● Communication<br>● Community Mobilization<br>● Execution | ● Community Mobilization<br>● Resilience<br>● Communication |
| Weaknesses | ● Fundraising<br>● Time management<br>● Organization<br>● Management/Delegation | ● Management/Delegation<br>● Communication | ● Leadership<br>● Delegation | ● Execution<br>● Partnership/Collab. |

- **FINDING 5:** The 2016 cohort generally proves to be a group of 'Achiever' leaders driven by results and focused on success as understood through 'Transformations of Leadership' theory.

In order to summarize an outcome of the program, Transformations of Leadership Theory[12][13][14] was utilized to document the 'end state' of the fellows' leadership development based on their attitudes, behaviors, performance, and feedback throughout the program. This model and its associated 'action logics' are a means by which to identify where the fellows landed in terms of their leadership styles following their completion of the program. Their overall scores were calculated within the program evaluation framework and then overlaid on top of the continuum of leadership transformation to describe each fellow's dominant leadership style as well as the qualities associated with that style.

Four (4) of the nine fellows who graduated fell into the 'Achiever' category, reflecting a dominant leadership style that values goals, effectiveness, and feedback. Achievers are also beginning to appreciate their potential influence on a broader system of work. Their focus on objectivity and results, however, may limit their ability to consider the subjective nature of

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[12] David Rooke and William Torbert, "Seven Transformations of Leadership," Harvard Business Review, last accessed February 21, 2017, https://hbr.org/2005/04/seven-transformations-of-leadership.

[13] Tolbert et al, *Action Inquiry: The Secret of Timely and Transforming Leadership*, Brett-Koehler, 2004.

[14] Fisher at al, *Personal and Organisational Transformations through Action Inquiry*, Edge/Work Press 2000.

leadership and most effectively leverage their use of self in leading and driving change. Three (3) of the nine graduating fellows fell into the 'Expert' category, reflecting a dominant leadership style that relies on objectivity and facts. Experts are strong and passionate contributors and often viewed as a subject matter experts. Experts also tend to rely on their own belief systems to guide their decision-making, which may similarly hinder their leadership potential.

One (1) fellow fell closer to the 'Individualist' rather than 'Expert' category, and another appears to have moved past the 'Individualist' category toward that of 'Strategist.' Unlike the Achiever, the Individualist is focused less on goals and more on self. They have a deep appreciation for complexity and feel comfortable operating at a systems level, often working through relationships and questioning assumptions. The Strategist enjoys playing many roles, embracing theory, process, and outcomes. Strategists understand how their worldview might impact their ideas and actions, and utilize this knowledge to lead movements and influence change. While the data represented in Figure 4 reflect each fellow's dominant leadership style, all of them exhibit behaviors associated with more than one action logic.

**Figure 5: Fellows' Dominant Leadership Styles**
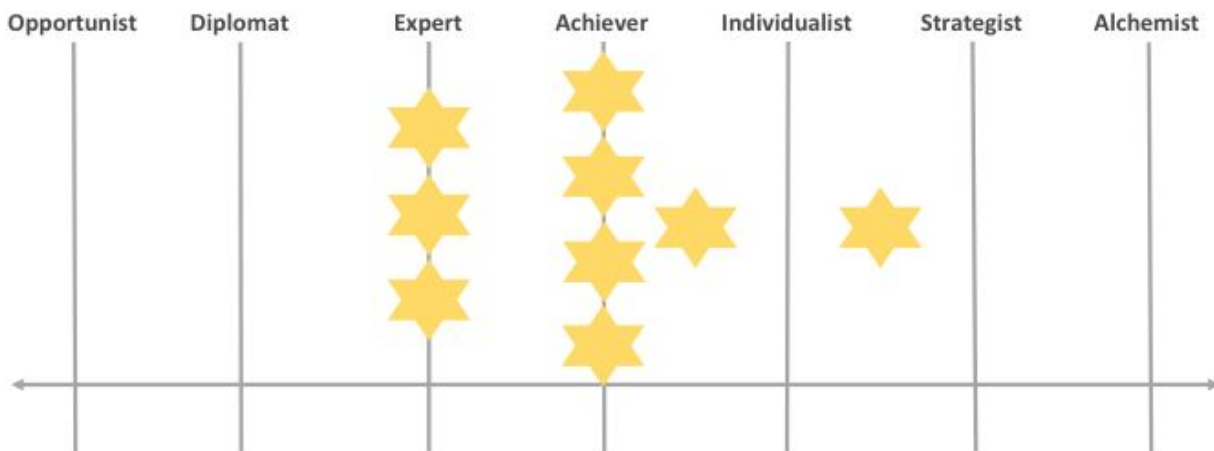
- **FINDING 6:** Feedback shared by the fellows throughout and at the end of the program suggest participants were very satisfied with the structure and content of the fellowship program.

The April skill-building retreat focused on leading people and organization scored highest on evaluative surveys, and fellows highlighted the care that went into coordinating food, logistics, and various other aspects of the three retreats. Coaching sessions scored the lowest although the data (as captured in Figure 5) suggest fellows were not unhappy with these elements of the program per se but indifferent. The fellows also reported that they are leaving the fellowship program with many more personal and professionals skills than they had at the beginning of the program.

In terms of retreat programming, the fellows said they appreciated the mix of workshops focused on both technical and non-technical skills. In terms of areas for improvement, the fellows suggested adding more time for discussion into the program curriculum as well as increasing the number of collaborative and experiential learning opportunities. Fellows also flagged problematic language used by a few workshop facilitators and guests including the misuse of gender pronouns.

Overall, the Fellows were very pleased with the program, indicating overwhelmingly that they feel as if they improved their non-profit management skills, increased their confidence in their ability to be a leader, and became part of an informal, peer-to-peer support network after participating in the HIV 360° Fellowship Program.
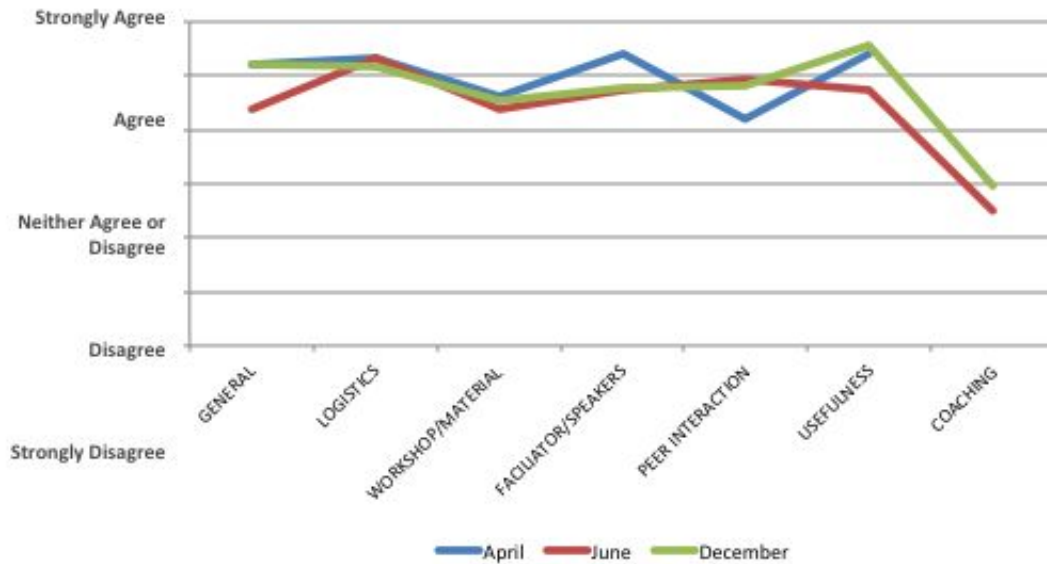
**Figure 6: Degree to Which Fellows Were Satisfied with Program Components**



**CONCLUSION**

Despite a number of considerations and limitations, this comprehensive evaluation finds that the HIV 360° Fellowship Program had an overwhelmingly positive impact on the 2016 fellows, who are all well-positioned to build on the program's successes. Improvements can and should be made to both measure and maximize the program's effectiveness in 2017.

**ACKNOWLEDGEMENTS**

The HRC Foundation would like to thank the Elton John AIDS Foundation for their continued support of our work to end the HIV and AIDS epidemic. The HRC Foundation would also like to thank Pipeline Consulting and The Collective Good for providing much needed guidance and perspective throughout the program, as well all those who served as coaches, mentors, and faculty members at one of the HIV 360° skill-building retreats. Finally, the HRC Foundation would like to thank the 2016 fellows and their respective organizations for embarking on this journey with us.

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