

Expanding Equity

*Transformation & Leadership
Among LEO Marin Alumni*

JUNE 2021

*Prepared for
Marin Community
Foundation*

*Prepared by
Informing Change*

INTRODUCTION

Leadership for Equity and Opportunity (LEO) is a learning-in-action program that equips a diverse group of community leaders with the practices necessary to produce extraordinary results for systemic and equitable individual, organizational, and community change. Based on Dr. Monica Sharma's *Radical Transformational Leadership* framework—developed initially to address public health crises like HIV/AIDS and human trafficking—LEO participants learn to source their inner capacities, work across silos, and design for sustainable change by leaning on the shared language and tools developed during the program.

In the Bay Area, LEO is hosted by Impact Launch, in partnership with local organizations, and comprises over 1,000 alumni across its nine counties, including 300 in Marin. In addition to learning elements of the framework, LEO participants bring to the program a project in their community—typically addressing an issue in education, employment, social services, and beyond—that they work on throughout and after the program in ways that rethink and transform unworkable systems to solve problems. LEO participants commit to attending three program sessions (each lasting three days) facilitated by Megan Joseph of Impact Launch and Dr. Monica Sharma, supporting colleagues through a peer-to-peer model, and spending time outside of the sessions working on their projects by implementing the LEO learnings and tools.

Marin County has hosted three LEO cohorts, the third of which was virtual to accommodate the COVID-19 restrictions in place as of April 2021. Funded through the Buck Family Fund of Marin Community Foundation (MCF), LEO Marin aims to achieve deeper and more sustained equity in the county. Although the county boasts the second highest household income in the Bay Area and 14th in the country,¹ substantial disparities persist. For example, whereas Latinx residents comprise 16% of the total population, they account for 28% of residents living in poverty,² and made up 70% of confirmed COVID-19 cases. Gender disparities in income are also quite prominent. Among the 7.6% of residents in Marin who live below the federal poverty line, women between the ages 18–44 account for the largest demographic living in poverty at nearly 22%.³

In addition to health and income, resource disparities are prominent within the county. In the San Rafael Canal area, home to the county's largest Latinx community (85.3% identify themselves as Latinx),⁴ only 58% of Canal residents indicated their internet connection was strong, compared to 87% of county residents living outside of the Canal.⁵ Such weak internet connection affects the ability of Latinx students to participate in virtual classrooms and access educational resources.

LEO cohorts have focused on shifting from talking about equity to taking concrete action on equity by developing synergistic partnerships, increasing participation of Black and Indigenous people and people of color (BIPOC) at all levels of leadership, and designing systems with equity at the forefront. Examples of past alumni projects include embedding equity into support systems for rising 9th graders at Tamalpais High School, tackling equity challenges internally at Marin Promise Partnership, and stepping into new leadership roles committed to taking action at the Canal Alliance.

¹ US Census. (2019). 2019 American Community Survey. <https://data.census.gov/>

² Data USA. (n.d.). COVID-19 in numbers: Marin County, CA. <https://datausa.io/profile/geo/marin-county-ca#economy>

³ Data USA. (n.d.). COVID-19 in numbers: Marin County, CA. <https://datausa.io/profile/geo/marin-county-ca#economy>

⁴ Marin Census 2020. (2019, September 16). *San Rafael Canal data profile*. <http://marincensus2020.org/wp-content/uploads/2019/09/San-Rafael-Canal-01-Factsheet-for-Website.pdf>

⁵ City of San Rafael. (2020, August 10). *Canal Wi-Fi and digital equity in San Rafael*. <https://www.cityofsanrafael.org/canal-wifi-and-digital-equity-in-san-rafael/>

THE EVALUATION

Informing Change has conducted two prior evaluations of LEO Marin cohorts, each with a slightly different focus, that together with this evaluation shed light on the multiple levels at which the work of LEO participants and alumni drive systemic change for equitable outcomes.

- **Participant Growth (2019, Cohort I):** In the first evaluation, LEO Marin Cohort I participants reported substantial gains in knowledge, values, attitudes, action, and leadership between entering and graduating from LEO Marin. Additionally, we heard from practitioner coaches (PCs)—LEO Marin training and support teams who themselves were graduates of prior LEO cohorts—that participating in the program was important to shifting and strengthening their personal values and mindsets. PCs discussed ways this personal growth influenced their interactions with others to better create collaborative spaces built on trust, communication, and aligned values.⁶
- **Taking Action on Equity (2020, Cohorts I & II):** Building on prior findings of personal growth, we set out in the second evaluation to explore commitments to and actions on equity among LEO Marin graduates. Through interviews with Cohort I alumni, and a post-program questionnaire with recent Cohort II graduates, we looked into the spaces and approaches they were activating (or intending to activate) for equity. While most of the Cohort I alumni—the older cohort—described taking actions at the organization level (e.g., staffing, decision-making, equity-based mindset to change norms and structures within their organization), more than half of the more recent cohort (Cohort II graduates) expressed intentions to take action at the community level.⁷

In the present evaluation (2020–2021), we dig deeper into how LEO Marin alumni are expanding equity in organizations and communities. Through interviews with 11 alumni from Cohorts I and II, representing five organizations, we explore the ways that alumni actions have changed and shifted systems in Marin County to contribute to more equitable outcomes. We sought to identify the successes, challenges, and opportunities to apply resources and insights from LEO participation to transform everyday activities, take action, and achieve longer systemic change. We selected this purposive sample of interviewees to reflect the range of sectors and settings most common to LEO Marin participants, and to include alumni who have reported making some progress in taking action on equity in their organizations and communities in Marin. We acknowledge that, by excluding alumni who may have made very little progress on their equity actions, we are not capturing the full range of experiences across all LEO Marin alumni. However, interviewees reported on barriers and challenges to applying LEO tools, taking action, and expanding equity, and reflect some of the conditions that may be compounded for others.

In what follows, we present three case studies and two spotlights based on these interviews. The case studies are more extensive and highlight stories that describe a clear application of LEO tools and learnings that have resulted in shifts for individuals, their organizations, and to some extent, the local community. Spotlights showcase snippets of personal and/or organizational growth. Before sharing these individual stories, we highlight some core themes and insights from across the interviews.

EXPANDING EQUITY: INSIGHTS ACROSS INTERVIEWS

LEO's equity framework, the Conscious Full-Spectrum Response (CFSR) framework, is the foundation for the entire LEO training. The framework has three different spaces: technical solutions and program interventions; systems, sustainability, and justice; and transformational leadership, capacity, and commitments (Exhibit 1, page 3). The ultimate goal of CFSR is to implement all three spaces simultaneously (e.g., solving a problem, shifting systems and norms, and activating inner capacity and universal values) on a journey toward equity.

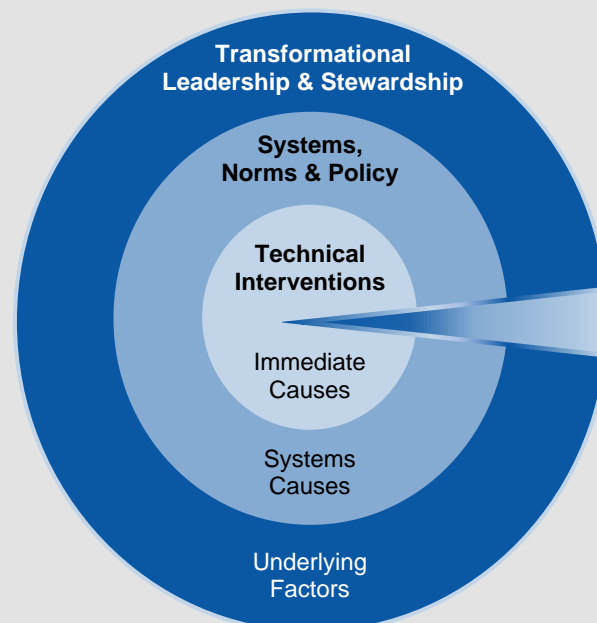
⁶ Informing Change. (2019, April). *Leadership for Equity and Opportunity (LEO): Focus group and survey analysis findings*.

⁷ Informing Change. (2020, April). *Taking action on equity: Second year evaluation of LEO Marin*.

LEO's Conscious Full-Spectrum Response framework[®]

Exhibit 1 | Dr. Monica Sharma, RTLeads

- **Transformational leadership, capacity, and commitments:** sourcing your and others' inner capacities and universal values to produce and sustain equitable results.
- **Systems, sustainability, and justice:** systems, norms and policies that must be changed to address what's maintaining the status quo and generate equitable and sustainable solutions.
- **Technical solutions and program interventions:** the immediate problems you seek to change through visible and measurable deliverables.



As in prior evaluations, the case studies and spotlights we present below demonstrate how LEO graduates and alumni are committed to taking action on equity. **They draw on and act within the CFSR framework in several ways.**

- **Transformational leadership, capacity, and commitments:** The courage to stand in one's values is a common theme throughout all the stories. LEO has been an important influence on articulating these values as well as on bolstering the courage to express and act on these values. This and other features of LEO have been important to how alumni are expanding their leadership around equity in sectors and communities, as well as in how they are partnering with others to make collective change.
- **Systems, sustainability, and justice:** The examples and stories interviewees shared reflect steps to shape and improve systems through expanding access and coordination within and across systems in Marin County. These system-level efforts, whether taken individually or collectively, make important contributions to tackling racial, economic, and other inequities throughout the county.
- **Technical solutions and program interventions:** LEO Marin graduates and alumni interviewed here talked about the ways they have adapted their service design and delivery to meet the needs of Marin residents more equitably. Some of these changes were made as organizations and groups grappled with the devastating consequences of the Covid-19 pandemic and other changes in their environments. Other changes were motivated by a deeper understanding and commitment to practicing and realizing their values.

Many of the interviewees we spoke with emphasized the benefits of collective participation in LEO Marin. **By sharing with other staff members in the knowledge, growth, and access to tools available through LEO, they found themselves better able to move forward together to effect change within their organizations and communities.**

Another common theme among these case studies and spotlights is **the importance of putting the tools, frameworks, and concepts to use through practice and continual use.** Social change takes time and requires shifts that are not necessarily immediate. The LEO tools and frameworks provide guidance on using and strengthening different muscles to facilitate these changes. This is not always “easy,” nor should it be.

Interviewees discussed these challenges and the importance of moving through the challenging phases to realize change. In addition to the main LEO Marin program, Impact Launch has been facilitating numerous strength-building engagements and opportunities to support alumni in practicing with the tools and putting them into use in their own context.

CASE STUDY: EDMO

At [EDMO](#), children are encouraged to develop their curiosity, courage, and kindness through high-quality Science, Technology, Engineering, Arts, and Math (STEAM) programming that interweaves principles of Social Emotional Learning (SEL). Based in Marin County, EDMO launched its first summer camp in 2004 and quickly expanded to provide a variety of in- and out-of-school experiences for youth in Northern California, with 17 in-office staff members.

In the Fall of 2019, Eduardo Caballero, Executive Director and Co-Founder of EDMO, along with three other members of his executive team attended the second Marin LEO cohort together. The decision came after a conversation with a trusted friend who had also been through LEO. Eduardo realized that attending LEO would be a great way for his team and organization to develop shared language and definitions, and a strong framework to drive their equity work forward.

Eduardo Caballero, Executive Director and Co-Founder of EDMO, attended LEO Marin in Fall 2019 with three other members of his executive team.

EDMO is being highlighted because of the ways Eduardo and his team at EDMO applied LEO principles across all aspects of LEO's Conscious Full-Spectrum Response (CFSR) framework, starting with Transformational Leadership and sourcing universal values to make shifts toward more equitable outcomes for youth in Marin.

As a result of attending LEO, Eduardo and the EDMO team were able to make a number of shifts in the way they show up for themselves and their organization, in the way they conceptualize and think about their work, and in the ways they engage with students and families—and in service of centering equity in all that they do.

Utilizing Transformational Leadership⁸ to Shift Systems

Prior to attending LEO, Eduardo and his team would craft high-quality programs (primarily summer camps) for families and kids, and recruit and register families through “traditional” methods of immediately registering paid families and reserving a small percentage of spots for scholarship students, typically allocated near the end of the registration period. Early on, equity meant providing scholarships.

However, after Eduardo and three members of his executive team attended LEO, they came to clarify their definitions of equity. For Eduardo, making this decision and going through LEO was “an organization-changing and also personal life-changing experience” because it allowed his team—and the organization—to align on what it means for EDMO to focus on equity. This experience enabled EDMO to make bold moves to course correct and steer EDMO firmly in the direction of *centering* equity in everything they did. This meant completely rethinking their processes and priorities in service of designing and delivering their programming through an equity lens. Eduardo is aware the process of embedding equity into all aspects of one's work is slow and steady, eloquently stating that, “equity is not a destination. It's not a noun. It's a verb. It's a practice. There's no quick way to get there—it is the name of the journey.”

“The other thing I learned too—it's a practice. Equity's not a destination, it's not a noun. It's a verb, it's a practice... There's no quick way to get there. It is the name of the journey.”

— Eduardo Caballero, CEO of EDMO

⁸ To learn more about “Transformational Leadership” and the entire Conscious Full-Spectrum Response (CFSR) framework, see p. 3.

Shifting Systems Toward Equity & Justice

In late 2019, the EDMO team started developing a new equity-centered summer camp program in San Rafael that sought to intentionally bring together in equal numbers of families paying full price and families accessing financial aid. Studies have shown that there is a link between student outcomes and the social and economic composition of the student body.⁹ Coupled with research demonstrating the role that non-school and summer environments play in exacerbating socioeconomic achievement gaps,¹⁰ pursuing this strategy made perfect sense. Eduardo set out to build partnerships and convince others of the importance of this camp's model and its benefit to Marin's youth.



Photo courtesy of EDMO

Building Partnerships Through Transformational Leadership

One of the first meetings Eduardo had in search of partnerships was with the superintendent of San Rafael's school district. As most LEO participants do, Eduardo started the meeting with the LEO practice of stating his values and what he stands for before proceeding to make his case for the summer program. Coincidentally, the superintendent was also a LEO alum and familiar with the practice of starting meetings with your "stand" or values. This practice allowed them to identify their shared values and quickly reach an understanding of the interrelatedness of their goals. Equipped with the support of the school district and more confident in speaking his values and spurring action, Eduardo continued to build momentum for the summer program through PTA and district meetings and presentations using LEO tools like grounding in your **Stand** and **Speaking for Action**.

The simple yet powerful act of recognizing and standing in one's values has a ripple effect that others outside of EDMO also recognize. As Eduardo says, "The fact that now, in an instant, you can ask me, what are my core values, and I can tell you, and that I publicly took that stand and said that in front of a crowd of people, and then continued to say that to my staff or to people that I work with. I think that this is probably the most powerful thing—I've never been so intentional about having integrity around what I'm doing, and that other people around me also have integrity." In 2020 alone, EDMO was able to start four different partnerships with youth-serving organizations that allow EDMO to increase their reach and for partners to increase the quality of their offerings.

Meeting Immediate Needs & Shifting Systems while Building Equity: A Financial Aid Honor System

Despite the enthusiasm and support for the camp, as the reality of the Covid-19 pandemic and shelter-in-place orders descended over the Bay Area in March 2020, EDMO staff realized they would not be able to run the San Rafael summer program. As EDMO—like every other industry across the country—shifted to virtual, their commitment to equity and to applying LEO principles remained firmly in place. "Hey, if we have to redesign our organization from the ground-up to be an online program, well, let's take this as an opportunity to design

"I really saw how we could actually create some systemic change, and change the language around access to summer learning, and equity, and out of school time, and get parents on board. I mean it was incredible."

— Eduardo Caballero, CEO of EDMO

⁹ Evitts Dickinson, E. (2016). *Coleman report set the standard for the study of public education*. John Hopkins University. <https://hub.jhu.edu/magazine/2016/winter/coleman-report-public-education/>

¹⁰ Downey, D. B. & Condrón, D. J. (2016). Fifty years since the Coleman report: Rethinking the relationship between schools and inequality. *American Sociological Association, Sociology of Education*, 89(3), 207-220. <https://journals.sagepub.com/doi/pdf/10.1177/0038040716651676>

with equity from the beginning;” this was the mentality that prevailed at EDMO, says Eduardo. The team set out to build a curriculum that could be done online—with as little as a smartphone—and decided they would design for equity. As the EDMO team learned in LEO, “you design for equity as far as you can, and then when you hit a wall, you put out your hand and you ask for help.” EDMO could not, on its own, solve problems of digital access (e.g., Wi-Fi, equipment, digital literacy, and a world turned virtual) but could use LEO language, tools, and resources to win over partners in service of greater equity.

The shift to virtual offered a possibility that EDMO staff might not have thought about prior to their participation in LEO. The lower cost of running online programs and a keen awareness of the difficult process for families seeking financial aid led EDMO to implement a financial aid honor system. When a family—any family—signed up on EDMO’s website to attend virtual camp during the summer, they would be offered a series of discount codes right next to the price if they needed it—no long forms or delays, just trust. In the end, about 70% of families ended up paying full price. While EDMO could not afford to keep the exact same process for in-person camps (in summer 2021), they have kept the shorter form and instant access model and want to continue to build and explore processes that further shift the power dynamic and allows families to stand in equity with EDMO.

Shifting Systems Inside & Out

While LEO offers a cadre of tools for individuals and organizations to implement in working toward systemic change at various levels, it also imbues a powerful feeling of commitment to equity and each other. Staff at EDMO can now feel the difference in the way the lens has been focused and they are now designing for equity rather than figuring out how to embed it after the fact. Eduardo recognizes that this is not a quick fix but believes “it’s just sunk into the culture of who we are now and sinking more deeply... we’re a different organization than we were a year ago, and I’m excited to see where we’ll be in five years if we continue working our equity muscles.” EDMO still experiences limitations—it may not be possible yet to drastically reduce price points, for instance—but there is a desire to challenge themselves, see how far they can get, and bring others along with them.

In addition to the programmatic shifts, EDMO’s organizational culture has also benefitted from a decentralization of power and a focus on a co-design process. The curriculum designers now gather input from a range of community stakeholders, modeled after LEO’s practice of bringing together diverse individuals from different sectors and roles, especially those closest to the issues. Planning now takes place with the input of multiple people across the organization and allows for more voices to speak up while those who used to dominate the discussion deepen their listening skills. The culture change is slowly seeping through all levels, as Eduardo notes, “I’ve seen that across the board, with not just our executive team, but now our curriculum team when they’re designing curriculum. They’re looking at it through that, even our marketing team is thinking about that.”

“Absolutely, yes. Keep funding [LEO]. Make it available to more people. I mean, the only reason that we were able to send our whole team there was because it was provided free... Like I said, I would love to see more [funders] there, and at the high levels—folks going in there and being a part of it.”

— Eduardo Caballero, CEO of EDMO

Continuing the Journey: There’s Always More to Be Done

When asked, “What do you think the community could do if more people went through LEO?” Eduardo emphatically begins with, “Oh, my goodness, don’t get me started.” He continues to state that LEO is a powerful experience for the individuals and organizations that participate. The effects are tangible in their internal operations, their external engagement, and the reach and impact they are able to have in the community. And yet, there is always more to be done. Eduardo envisions a Marin where more funders, more businesses, more community members could go through the transformational LEO program and truly align on values to effect real

change. Eduardo points to the conversation with San Rafael’s Superintendent and the ease with which their shared language and alignment allowed them to move the camp project forward to say, “If having that common language and that common integrity around equity can create something like that, I just see that as a microcosm... If a funder had been through LEO, what would that conversation be like now?” EDMO’s case shows how a little more understanding and a little more alignment can unlock tremendous potential.

CASE STUDY: NORTH MARIN COMMUNITY SERVICES

Born out of a merger between the Novato Youth Center and the Novato Human Needs Center, North Marin Community Services (NMCS), a human services nonprofit organization, was officially established in January 2018 (after serving the Marin community for 48 years). NMCS is a multi-service organization that seeks to address health disparities for children, adults, families, seniors, and immigrants, and does so through providing trauma-informed, and culturally appropriate support to some of Marin’s most marginalized communities.¹¹ The supports they offer range from financial support (i.e., budget planning, tax assistance), to education and childcare, and mental and community health. As part of their approach to community health, NMCS employs the Promotores model—empowering Latinx community leaders to find creative ways to connect and talk with their community about issues important to their health (see more about NMCS’ Promotores program below).

In late 2018, a broad cross-section of NMCS’s staff—including the CEO, Cheryl Paddock, Latinx Services Director, Berta Campos-Anicetti, and several volunteers in the Promotores program—signed up for and attended LEO in an effort to deepen their commitment to equity, both within themselves and at an organizational level, in order to better serve their community members in need.

One of the foundational spaces of LEO is **Transformational Leadership**.¹² In the LEO framework, *Transformational leadership, capacity, and commitments* is defined as sourcing your and others’ inner capacities and universal values to produce and sustain equitable results. By making space for everyone to build and hone their own leadership skills, as well as integrating tools and resources from LEO (such as deep listening, and speaking powerfully for results), the NMCS team has made significant changes to their own leadership, including how they interact with colleagues and peers. These transformational leadership changes have also had ripple effects that have empowered members of the larger Marin community.

Making Space for Leadership

The NMCS leadership was intentional in creating space for staff—and volunteers—to participate in LEO. Through their participation in LEO, NMCS has deepened its identity as a force for equity within Marin, and staff and volunteers have gone through a transformational process that has allowed them to tap into the natural leader

This case study was informed by interviews with:

Berta Campos-Anicetti
Director of Latinx Services

Beatriz García
Volunteer Promotora

Alicia Yopez
Case Manager and current Volunteer Promotora

The [NMCS Promotores Program](#) is a volunteer program that trains and engages Latinx community leaders to be connectors to health services and community engagement.

By working with community partners to host events, and connecting with individuals and families in the community, Promotores build their own leadership skills while also providing essential health and emotional support to the Marin Latinx community.

NMCS is being highlighted because of the ways the NMCS team applied LEO the principle of Transformational Leadership to make changes within themselves, at their organization, and within their community—all in service of a more equitable Marin.

¹¹ North Marin Community Services (n.d.). *About us*. <https://www.northmarincs.org/about/>

¹² To learn more about “Transformational Leadership” and the entire Conscious Full-Spectrum Response (CFSR) framework, see p. 3.

latent within each of them. An important aspect of LEO is that it brings together people from all different levels of different organizations who want to tackle equity issues. The practice of sharing a table between those with lots of power and those with less power creates confidence and breaks down barriers.

It may sound simple and straightforward to say “trust yourself,” but when actions have deep repercussions and others are counting on you for help and support, that trust is harder to achieve. For Beatriz, a volunteer Promotora, and Alicia, a Case Manager (and former volunteer Promotora), going through LEO has allowed them to grow into their potential, gain confidence, and increase the impact of their work. “I think everything that they gave us, all the tools, the way Monica [LEO’s founder and facilitator] talked to us, she made us go inside ourselves and see how valuable we are, how powerful we are. So she made us trust in ourselves... I am a woman with a lot of power, and I can do whatever I want if I want to do it.” In Latinx culture, people are taught to be humble and are discouraged from being strong leaders to avoid coming off as conceited or too full of themselves, says Berta, the Latinx Services Director at NMCS. LEO helped Berta and others realize that they *could* say they were strong, that they had power, *without* falling into conceit.

The Power of Deep Listening: Building Community Trust

For Beatriz, the opportunities to step out of her comfort zone in LEO have opened her eyes to her own power and helped her in role as a Promotora. The increased confidence Promotores (like Beatriz) gained through LEO enabled them to *really* listen to clients, to find solutions, to understand their issues and provide a higher level of support. As Beatriz says, “I think our community needs a lot of ears. So most of them are looking for people to listen to them and then the tools that we got from Monica to *notice and quieten background conversations*, and make sure we are listening to them.” By doing this, Promotores and NMCS staff build trust with their community, a vital element in effectively providing the services and support the community needs. In creating a trusting relationship with their clients, NMCS is able to scale their impact—those who trust you are more likely to be responsive to your help and in turn offer your help to others.

These deep listening skills also improve working relationships amongst colleagues. Beatriz describes that she does not shy away from difficult conversations in the way she used to. Instead, she listens and comes up with solutions, bringing in others as needed to foster a better working dynamic. The ultimate goal of truly listening is to empower people and to raise their voices so they feel heard. As Alicia states, “I think it’s just being heard, allowing them to talk through the issues they’re having. So I think they are being welcomed—our approach our listening ears, our eyes, our body language—I think is helping whatever we’re doing out there, if it’s just working with individuals, working with a group of people, or working with coworkers.”

Speaking Powerfully for Results

Transformational Leadership is sourcing one’s inner capacities. For NMCS staff, LEO provided the tools, resources, and practices to channel their courage and capacity to speak powerfully for results at multiple levels, all leading to powerful changes within the organization and the community.

“I think everything that they gave us, all the tools, the way Monica [LEO’s founder and facilitator] talked to us, she made us go inside ourselves and see how valuable we are, how powerful we are. So she made us trust in ourselves... I am a woman with a lot of power, and I can do whatever I want if I want to do it.”

– Beatriz García, Volunteer Promotora

Individual Level: Promotores Speaking Up

For Alicia, going through LEO shoulder-to-shoulder with staff at all levels of NMCS and seeing the CEO's enthusiasm in adopting LEO's equity principles individually and at the organizational level was a transformational experience. As Alicia gained tools and resources to build her confidence, she also felt more empowered to bring her ideas to the leadership team to push for improvements. Alicia had thoughts about how to improve her work as a Promotora for years but was also a little bit leery of bringing those suggestions to the leadership team. As Alicia continued to study the LEO materials (such as *speaking powerfully as a leader* and *providing feedback for growth*), she questioned whether she was truly internalizing the materials. The breakthrough moment came when Alicia decided to bring up changes she'd like to see with the *Cafecitos*.¹³ Alicia points out that she "was trying to implement the same thing, same mentality, same state of mind [and] think of how I'm going to approach Berta and Silvia, not to offend them, not to say that I wasn't happy with what we were doing, but could we possibly make some changes in the presentation." The response was positive. Since then, Alicia has continued to hone her skills and has since received a promotion and is now Case Manager at NMCS, thanks in part to the confidence and skills she gained during her time at LEO, which prepared her to take the opportunity when it became available. Alicia says, "I felt like I had the things that I needed, the tools that I needed and the words, the listening, the values, the support from my coworkers. It felt good."



Photo courtesy of Impact Launch

Similarly, Berta describes the changes she has seen in Beatriz, a volunteer Promotora who works at a school library, since she went through LEO, sharing a table with the superintendent of her school district. Beatriz gained confidence to speak powerfully to the superintendent face-to-face and voice the issues she sees—racism, discrimination—in a way she would not have imagined possible prior to LEO. According to Beatriz, "The superintendent was very open and encouraged me to share any issues or incidents that I encountered. I felt heard and had a sense of relief to be able to find a way to express my feelings." In fact, prior to participation in LEO, Beatriz was apprehensive about her ability to speak English as a second language and worried when speaking in front of groups. Through hard work and perseverance in the LEO sessions, Beatriz gained enough confidence to step up and speak to the entire group—her boss included—about her experience.

Organization Level: NMCS Speaking Up from Their Values

As an organization, NMCS has gone through a reexamination of their values, their public stance on issues, and the ways in which they engage their counterparts in Marin. Berta points out that "some of our organization—among other organizations too—we've been afraid to say certain things, to stand up to issues because we're afraid that our funders are going to get offended and that therefore we're not going to have the money to do the work." However, says Berta, by having a broad range of staff attend LEO, she can now see NMCS put forward a different stance than they used to. She points to the public statements NMCS made in the wake of the movement for Black lives and after the storming of the capitol on January 6, 2021 as examples of standing firmly in their values. These types of statements are made by many organizations, but Berta feels that NMCS is also putting out an unspoken message to the community that "by doing things like that, by not being afraid, we are saying, you can trust us." As a result, NMCS has seen an increase in services—often through word-of-mouth—especially as individuals and families continue to face the economic and health effects of the Covid-19 pandemic.

¹³ *Cafecitos* are community presentations hosted by the Promotores to discuss issues of community health with parents and caretakers (e.g., on topics like underage drinking and marijuana use) to reduce and prevent youth substance abuse.

County Level: Speaking Up to Stand Up for Inequity

At the county level, NMCS, as an organization, leaned on its renewed stance on values to speak up powerfully against injustices at the various tables that it occupies within the county. NMCS is co-chair of the Novato Covid Emergency Search Response and is using its influence to point out inequities at a systems level; for example, the county worked with NMCS to hire a Case Manager specifically for Covid-19-positive families in Novato, though the position was only temporary. Because the hire was bilingual, they ended up responding for most of the Spanish-speaking cases for many other cities in the county, ultimately putting a burden on the rest of the staff at NMCS. While, in the past, NMCS might have accepted this and worked to renew the position at the behest of the county, they instead raised this issue and pointed out that it was not sustainable. Ultimately, the county agreed to some changes, and they have moved forward with renewing the positions. While inequities persist, having the courage to speak up when necessary means that NMCS is listening to their community and elevating voices often left unheard. As a result, Berta feels that the team is "very excited to now have a great partnership with the County and to work together towards equity."

Transforming Systems in Marin

There is no doubt for NMCS that LEO was transformational both for staff individually and for the organization as a whole. Alicia is aware that not everyone sees these changes immediately, that the training is challenging, and it might not be possible for those who need it most to attend without [aid], but the investment is worth it. When asked whether it is worth it to keep funding LEO, Alicia says, "Yes, it's a great investment in our community leaders. It's an investment for the community, for the individual." Without the financial support to participate in the program, many individuals like Alicia and Beatriz would not have been able to participate in LEO and grow to make the impact and contributions they are currently making.

As these changes permeate through NMCS, and as staff continue to model this in their communities, Beatriz hopes that more people can benefit from what she has gained from LEO. While the benefits should not be expected to be instant, Beatriz does feel the positive impact radiating out beyond NMCS. "For example," says Beatriz, "I feel like when I am helping somebody, when I am in the community, I am helping to train another leader. So it's like a leader training another leader—it's like a chain." The pandemic did not allow for more NMCS staff to attend LEO this year, but Berta says, "We already have a list of who we want to send, new staff, or people who are ready. And so, yeah, absolutely, totally worth it."

***"It's like everything is linked.
One leader helps another leader
and then we'll be two leaders.
And this second leader is going
to help me train a third leader
and this is how we have an
impact in society, in the
community."***

— Beatriz García, Volunteer Promotora

CASE STUDY: COMMUNITY ACTION MARIN

With origins in the Economic Opportunity Act of 1964 and the civil rights movement, [Community Action Marin](#) (CAM) roots itself in racial and economic justice and seeks to create a Marin County where all people are able to achieve well-being and access the services they need to thrive. In Marin County, a family of four (two parents and two children), would need to earn roughly \$125K a year to cover essential costs such as housing, childcare, health care, food, and transportation. Black and Latinx families are two times more likely to fall below this standard, in comparison to white residents (according to the Insight Center for Community Economic Development).¹⁴ To combat the inequities, CAM places people at the center of its work, offering a bundle of services to help families and individuals move to self-sufficiency. The largest nonprofit provider of social services in Marin County, the agency staff, board, and volunteers work to create a Marin where all residents can thrive. CAM works to identify

¹⁴ Insight Center. (n.d.). *Family needs calculator (formerly the self-sufficiency standard)*. <https://insightcced.org/2018-family-needs-calculator/>

and address the root causes of racial and economic inequities and dismantle barriers to service delivery and advocacy through a trauma-informed, human-centered approach.

In 2017, Community Action Marin’s Director of Economic Opportunity and Workforce Development, Heather Bettini, attended LEO’s first Marin cohort. With her support and encouragement, 17 other CAM staff members, including then-entering CEO Chandra Alexandre and frontline staff member Gabriel Hernandez, attended the second LEO Marin cohort in 2018–19. Chandra envisioned utilizing LEO as “a vehicle for professional development to help the agency center equity and ensure more equitable outcomes in community.” Gabriel was among the staff members encouraged to participate and described the experience as unexpectedly transformative: “I totally went in not knowing what I was about to experience, and it completely changed my life and my perspective.” LEO frameworks and tools have since become integral to Community Action Marin’s work on establishing a fully inclusive culture where every employee belongs. Thus far, upwards of 30 leadership and staff members have participated in LEO and its tools and practices are increasingly coming to life within the organization.

This case study was informed by interviews with:

Chandra Alexandre
Chief Executive Officer

Heather Bettini
Director of Economic Opportunity & Workforce Development

Gabriel Hernandez
Frontline staff supporting Children and Family Services

CAM is being highlighted because of the ways the CAM team has applied the LEO Transformational Results Chain to completely shift their organization toward greater equity.

Using the Transformational Results Chain for Equitable Results

The **Transformational Results Chain** (TRC) is one way of planning for and a tool to think about how to bring about the concurrent shifts outlined in the CFSR Framework.¹⁵ The TRC helps teams design programs or processes starting with the impact and designing backwards, while also grounding teams and implementation in shared values.

Sourcing Universal Values

As CAM CEO, Chandra Alexandre states, “[LEO] has helped us build a structure and a language that reinforces why we’re here as an agency and why we as individuals show up for work every day, which is really powerful.” Being driven by and leading with their values allowed CAM to serve from the heart and with a genuine desire to make a difference by connecting from staff to community as people first. Leading with these values allowed the CAM team to revise and reimagine how to align internal and external processes as relational, not transactional. It also fostered a shared vision and efforts to connect people and processes to inform and make change meaningful. Starting with the vision of a more equitable Marin, CAM staff now examine each entry point for services to ensure family-centered outcomes and the strengths of community. Staff across the agency are reimagining and rebuilding the systems in which they work, including transforming how they work.

For some years, Community Action Marin had operated in programmatic silos. For instance, frontline staff in the children and family services department may not have had consistent communication channels with other frontline staff offering rental assistance, food support, or financial coaching—although the needs of families crossed multiple service areas. This created inefficiencies and made it harder for staff and the community to reach effective and efficient solutions.

One way in which the team started aligning processes with agency values was to create a network of agency “success coaches” committed to better outcomes. These frontline staff from various teams and departments started meeting regularly to get to know one another; learn about each other’s roles, client intake, eligibility

¹⁵ For more information about LEO and the full Conscious Full-Spectrum Response (CFSR) framework, see p. 3.

requirements; and ensure strengthened problem solving and access to services to meet individuals' and families' needs. Putting relationships first, aligned with agency values, created better supports and sustainable successes quickly, both internally and within the community.

Another set of strategies included increasing transparency around staff, board, and leadership demographics; strengthening direct training with supervisors, hiring managers; and addressing human resources processes to dismantle racism in the system and increase awareness of implicit bias. The agency also made a commitment to pay equity with regular reports on progress to staff and recently implemented a \$15/hour minimum wage. A focus on economic justice and self-sufficiency for all required staff to connect with shared values of inclusivity and service. It required diligence and analyses to look at pay gaps, especially for frontline staff. In one of the most expensive counties in the state, embodying these values required honesty about what was not working, transparency about what it will take to move toward a living wage, and a recognition that staff are often also the community we serve. Our shared humanity connects us to our work and ensures that decision-making at all levels is rooted in universal values as we move together toward pay equity goals.

“It’s not about doing something new. It’s about doing what you’re already doing differently to create better outcomes and more impact.”

– Heather Bettini, Director of Economic Opportunity

Transformational Manager, Leader, Steward

Another key component of the TRC are the roles each changemaker plays to support reaching the intended impact. There are three main roles that are integral to making the TRC work: the *transformational steward*, focused on shifting the overall paradigm toward sustainability, justice, and equity; the *transformational leader* focused on making principled strategic system shifts; and the *transformational manager*, focused on transforming routine activities and tasks. These roles connect and align people (e.g., colleagues) with organizational processes and practices, and commit to creating change, while also empowering others to create values-based change in everything they do, from design and implementation to all the spaces in between inputs and impacts.¹⁶

As part of Chandra’s commitment to better community outcomes, she increased collaboration and communication across the organization when she began as the CEO. Doing so required not only developing new processes but also shifting organizational culture: “We had to move away from fractured and fear-based, [and] I knew that could only happen authentically. [...] We could only get there by starting to create a trust-based culture, by actually listening to one another, and by having conversations that put heart and people and purpose in the center.” The TRC was a framework that helped Community Action Marin shift their organization’s culture to one more aligned with their desired impacts and to more practical ways to live their shared organizational values of service, unity, relationship, and inclusivity.

As an early step toward agency-wide culture change, Chandra chartered a staff council of non-management level team members in 2018, as a way to give frontline staff a direct line of communication with the executive team. According to Gabriel, the staff council became a bridge between team members across the agency, helping staff feel a part of “one united Community Action Marin.” Paired with perspectives and tools provided by LEO, such as listening for the commitment behind the complaint, the staff council helped to shift organizational culture toward deep listening and embracing multiple perspectives in decision-making. As Heather described, staff are now better able “to quiet our background conversations and actually hold space for others. [...] As we listen to each other, we can really come together and create differently. We can build differently.”

¹⁶ Sharma, M. (2014). *Sourcing wisdom for just and sustainable results*. KOSMOS Journal for Global Transformation. <https://www.kosmosjournal.org/article/sourcing-wisdom-for-just-and-sustainable-results/>.

LEO provided Community Action Marin with a framework, a tool set, a language, and even suggested roles for doing this culture-change work in service to equity. By improving communication and collaboration internally, the agency has found itself better equipped to engage with the larger Marin community and adapt to residents' changing needs. For example, staff recently formed a task force to think about how to better partner with Marin City, a diverse, historically Black/African American community that was divested from predominantly white Marin. By posing the question, "How can we best meet people where they are to learn what they need and connect them to services that help them along pathways to thriving?" this task force is partnering locally to better support people in Marin City along the crisis-to-thriving continuum.

The *Respond and Realize* tool was instrumental in intentionally creating strategies to both address the symptoms of poverty and racism through direct services and also the root causes of it through policy and advocacy. For example, the agency is administering \$16 million in rental assistance for Marin County as a direct response to the inability of many residents, primarily people of color most impacted by the socio-economic inequities created by the pandemic, to pay rent. At the same time, Community Action Marin has been an integral partner in the Canal Policy Working Group, which has led efforts on a county-wide rent freeze and eviction moratoria across the county.

Breaking Down to Breakthrough

The Community Action Marin team is not only making changes internally within their organization and practice, but also is using LEO tools to shift practices with the community. Using the *breakdown to breakthrough* methodology, the CAM team has improved how the agency identifies and addresses gaps in their services. Instead of viewing issues as problems, this methodology creates space for reframing problems as the absence of something.

For example, Heather described a situation when the agency received difficult feedback from a community partner, as a person this partner had referred to Community Action Marin's services had been unable to receive the resources they needed. In response, Heather called a meeting with a group of frontline staff and supervisors to become grounded in a set of shared values, an understanding of the organization's mission, and a foundation of respect for multiple perspectives. Opening the space with a stated desire to "create equity of opportunity" helped the team to identify systemic issues while avoiding defensiveness or finger-pointing. As a result, the agency realized that their current processes and systems to access services were not in fact suitable to addressing some community members' needs during the Covid-19 pandemic. People were getting stuck and not receiving services. The *breakthrough* occurred in identifying next steps for shifting the agency's intake processes and systems to remove barriers to accessing services.

Another example of how the agency has embraced the *breakdown to breakthrough* framework was through the collection of employee feedback through the administration of an opinion survey from which concrete actions were developed and communicated to address areas of improvement. In direct response to frontline staff feedback



Photo courtesy of Community Action Marin

“One of the main things in the transformation of our organization was... how can we help other people if we, ourselves, are not feeling like we’re being helped as workers?”

– Gabriel Hernandez, Frontline staff member

about the lack of connection to the Board of Directors and leadership, the agency implemented a new anonymous online suggestion box for staff input and reintroduced quarterly meetings between Staff Council and the Executive Team to build connection and communication toward problem solving. The agency also created a series of board and staff informal sessions by department to open discussion about community challenges and share success stories. The first “Windows on CARE Outreach Teams” session helped board and staff connect around the difficulties of serving the homeless population while also celebrating wins together. Seeing the possibilities for creating better outcomes and shared insight on strategies that close gaps and advance equity are some direct outcomes of the use of this powerful LEO methodology.

“[LEO] hasn’t just changed the organization. It actually changes your perspective on life in general, how you see others, how you see yourself.”

– Gabriel Hernandez, Frontline staff member

Transforming Systems in Marin

When asked about what the process of applying LEO tools has been like, Gabriel was quick to highlight the ways that organizational and personal transformation are integrally linked: “mastering LEO is close to mastering life. [...] It’s a learning process, just like life itself.” Heather similarly described how LEO helped her to become a more effective change agent, by standing in her values and setting aside her fears. “When we are transforming systems and creating change, people will not be clapping for us,” Heather said, “yet we need the courage to be able to continue the course and bring on people who can support us.” By adopting a learner’s mindset and rejecting the urge to find quick fixes, staff have become more willing to take a step back, have deep conversations, and connect from a place of shared values. In the spirit of stepping back and continuing their equity journey, CAM as an organization instituted an annual “pause day” to center staff in the organization’s values and discuss, as a full team, how to make tangible progress toward Community Action Marin’s vision. As Chandra says, “It’s about living, breathing, acting, honoring these ways of thinking and doing in order to create the kinds of outcomes that we want.” Similarly, Gabriel hopes that Community Action Marin can help to bring about a Marin community where no one has to mold themselves “to what the system wants us to be.” Instead, “if everybody comes with their best, what can we create? What would that look like?”

INDIVIDUAL SPOTLIGHT: ALEXA DAVIDSON

Founded in 1969, the [San Geronimo Valley Community Center](https://www.sgvcc.org/our-mission/) (SGVCC) serves four unincorporated towns in the western, highly forested area of Marin County. Because of its unique location, SGVCC seeks to create an inclusive, diverse, and dynamic center for human services that provide arts and culture, health and wellness, education, and community-building opportunities for its local residents.¹⁷ Fresh out of graduate school, Alexa Davidson joined the San Geronimo Valley Community Center as the Young Adult Coordinator. In this role, Alexa worked to engage the young adults in the community and provide opportunities for them to connect with SGVCC and with one another.

In the years prior, a couple of SGVCC staff had attended LEO, and in 2019, Alexa was given the opportunity to participate in the second Marin LEO cohort. Prior to attending LEO, Alexa was already beginning to think broadly about her role, aiming not only to shifting what and how she was doing her work, but thinking about how to change the larger systems in which her work with young adults exists both inside and outside of her organization (i.e., in the community). Since LEO, Alexa has transitioned into a new role as the Director of Development and Strategic Initiatives, and she continues to bring these tools into her work and expanded leadership role.

¹⁷ San Geronimo Valley Community Center. (n.d.). *Our mission*. <https://www.sgvcc.org/our-mission/>

Involving & Empowering Youth

As part of her role as Young Adult Coordinator, Alexa was responsible for engaging and integrating young adults in the community (or the “NextGen,” as SGVCC likes to call them) into the programs at SGVCC. Early on for Alexa, that meant putting on events and seeing how many of the young adults would show up.

However, LEO gave Alexa the tools and opportunity to rethink and reimagine how to shift systems and practices to center the young adults in everything she did. In using the *respond and realize framework*, she realized that her work needed to focus on responding to the full needs of young adults—not just putting on movie nights. Alexa then asked herself, “How do we realize the full potential of these young adults and actually get them to be a part of the community in a meaningful way?” This tool/framework helped Alexa realize that she wanted these young adults to be “in rooms of power, [being able to] advocate for their own voices and being able to show up in a real way.”

As a result, the NextGen board of directors was born. In this role, NextGen board of directors serve together in a cohort of three and get to determine how, when, and what they would like to be involved in—creating a young adult voice for the local West Marin community. Since its inception, the group has created meaningful opportunities out of their own self-expression (one of Alexa’s values), such as a climate activism group where high schoolers are working with young adults on education and awareness events and campaigns for climate activism. Youth are embracing this opportunity for leadership, building connections, and integrating themselves within the larger community.

Greater Confidence & Leadership in The Community

In addition to her NextGen young adult work at SGVCC, Alexa also plays a key role in her community as the chair of the [Juvenile Justice and Delinquency Prevention Commission for Marin County](#) (JJDPC).

As chair, Alexa often has to have difficult conversations around racism and police brutality with a broad set of community members (including youth, law enforcement, and the district attorney). Through LEO, Alexa has deepened her confidence and honed her skills in facilitation, deep listening, empathy, and speaking clearly for action. LEO has given her the tools to navigate these often-fraught conversations with ease.

The Marin County **Juvenile Justice & Delinquency Prevention Commission (JJDPC)** is a court-appointed group of community members committed to improving and monitoring the quality of juvenile justice programs in Marin County and ensuring all youth are treated in a fair and just manner.

Transforming Systems in Marin

For Alexa, LEO helped her re-think how she approaches her work, enabled her to work collaboratively with those closest to the issues and empower them to co-create solutions, and gave her the tools and confidence in the way she shows up for herself, in her organization, and in her community. After attending LEO, Alexa truly believes in the power of a shared language, a shared stance toward equity, and a shared knowledge of tools to engage with challenging and complex systems, and what they can do to help Marin County toward a more equitable, just, and sustainable county. She believes there is an opportunity to break down siloes, get to root causes, and co-create solutions for a thriving Marin.

ORGANIZATIONAL SPOTLIGHT: MARIN PROMISE PARTNERSHIP

[Marin Promise Partnership](#) (MPP) is a cross-sector cradle-to-career partnership made up of school superintendents, non-profit CBOs, community-based organization leaders, business leaders, government leaders and funders, all of whom have come together with a common vision where all Marin County students can reach their full educational potential. The partnership is supported by MPP’s backbone staff who play a key role in

bringing partners together and providing data and process support to facilitate collective action toward closing educational equity gaps.

As a partnership that seeks to promote educational equity amongst its partners and throughout Marin, MPP CEO, Ann Mathieson, also saw opportunities to shift internal practices toward great equity internally after attending LEO Bay Area (Oakland) in 2016–17. Since then, many of her colleagues have gone through LEO (one at the 2017–18 Oakland cohort, and the remainder in the various Marin cohorts). She has also committed that 100% of the backbone staff at MPP will go through LEO by the 2021 cohort. LEO provided the knowledge, tools, and resources to set the groundwork for numerous shifts toward equity.

Shifting Mindsets, Processes, & Power

One of the early exercises LEO participants go through is defining and homing in on their stand, using that statement as a vehicle for building and sharing universal values. This explicit sharing of values quickly builds common ground and connection. Through practices like starting meetings with your stand, and tools about how to move through difficult conversations, LEO builds participant leadership, confidence, and the courage to have the tough conversations participants might have shied away from before. By having these tough conversations, backbone staff at MPP have been able to critically reexamine how they are addressing equity internally, including who they engage and how they engage them.

For example, while attending LEO, MPP leadership and staff began discussing how to bring a more equitable voice and lift up the experiences of BIPOC youth and families, not just to gather their feedback, but to be a part of the structural governance of MPP with decision-making power. Instead of making decisions for the community and “talking at them,” MPP began planning and making decisions *with* them. This shift in mindset—of who holds the power to speak up and make decisions—is just one of the many ways the MPP is continuing to practice the tools learned at LEO.

Broadening the Focus: Shifting from Education Gaps to Education Ecosystem

Another shift the MPP team embraced after attending LEO was broadening their view of the systems in which they are a part of. Instead of focusing solely on the educational system, the MPP team has since adopted a whole-child approach and views their work as part of a larger educational ecosystem that supports youth (including nonprofits, families, community organizations, housing organizations, human services, food services, etc.). This broader systems view has broken down siloes and has strengthened the interconnectedness within the ecosystem as they all recognize their role in surrounding and supporting students in the educational ecosystem.

Transforming Systems in Marin

After sending almost all (soon to be all) of their staff to LEO, the MPP truly believes in the power of LEO to build connections across universal values, including the cross-sector collaboration needed to create a more equitable Marin. Staff also believe that funding participation (via MCF, instead of a self-pay model) provides the opportunity for many different individuals with different voices and perspectives to have the LEO experience, which otherwise wouldn't be possible. Marjorie Degladillo, MPP's Youth, Family, and Community Collaboratives Manager, also sees the potential to help Marin County move toward becoming more anti-racist by dismantling systems of oppression, especially those that exist in such a wealthy, yet stratified county.

CONCLUSION

When LEO launched, the program's Theory of Change envisioned a shift in narrative around equity and inclusion—from talk to action. The case studies in this report offer a clear picture of how alumni have incorporated the training they received into their strategy and decision making. By transforming their leadership style, participants have also transformed their organizations and the services they offer, with positive outcomes for their communities.

Leadership can be exerted from all levels of an organization. We see the different ways in which LEO influences leadership with North Marin Community Services, which enrolled top management staff as well as volunteer Promotores. The volunteers were especially impacted, as they developed a new sense of confidence.

Because of the leadership position of LEO participants, the value-driven solutions and interventions have the potential to impact large swaths of vulnerable communities in the county. A good example is the case of Community Action Marin, which aligned internal and external processes with goals that focused on family-centered outcomes.

The pandemic has highlighted how current inequities are resulting in more pronounced negative impacts among communities of color. Thus, the drive towards equity-centered system change is more crucial than ever. LEO alumni are well positioned to take the necessary actions for closing the equity gaps in Marin County. This was especially evident in the financial aid package EDMO instituted for its virtual programs, which targeted families who could not afford the full rates.

Racial disparities and inequity are still present throughout the county, but LEO demonstrates a powerful approach towards systemic change by transforming individuals and their organizations through a shared framework and set of values. While the program trains individuals, the nature of the LEO methodology results in a ripple approach where alumni build the capacity of other staff to move collectively towards equity through strategic and operational shifts, and the organizational-level improvements result in more meaningful and sustainable community-wide changes. The combination of these layered effects is essential to propel system-wide shifts.



1841 Berkeley Way
Berkeley, CA 94703
510.665.6100

informingchange.com