



Key Lessons from Developing a Leadership Development Program with Racial and Other Forms of Equity at the Core

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Preface

In a world experiencing rapid change, a COVID-19 pandemic, widening disparities, and growing frustration with racial inequity and social injustice, philanthropy needs to continue to cultivate and support leaders who can lead with equity at the core. Racial equity is a primary concern; at the same time, racial and ethnic identity intersects with other forms of identities that affect leadership including gender identity, sexual identity, and socioeconomic status. Historically, many leadership development programs have focused on investing in the individual as the unit of change. However, this strategy does not fully realize the potential and power in jointly investing in individual self-reflection and skill-building with the collaborative approach of connecting groups of leaders, and their networks, to work together to create change. This report looks at a program that does just that.

Organizations and communities need leaders who can lead with racial equity and other forms equity at the core and recognize unfairness and the impact of oppression on others who are similar to and different from them. Moreover, a network of leaders willing to take action in partnership with the people most impacted can lead to sustained efforts toward just communities where all members thrive. The Bush Foundation (The Foundation) answered the call to action from leaders in its region—Minnesota, North Dakota, South Dakota, and the 23 Native Nations that share the same geography—to invest in building a network of community leaders to lead social change and justice in their local contexts. The Foundation responded and invested in Change Networks, a new cohort-style leadership program piloted in 2017–2019 to support leaders in its region. The program helped leaders build their skills to effectively lead systems change in their organizations or communities in service of equity and inclusivity and apply those skills and practices through projects they develop and implement as part of the program. Leaders learned how to work effectively with people from similar and different backgrounds and gained new allies who will support them in their work during the program and beyond.

The Foundation has developed insights into leadership development work and its role in supporting leaders through Change Networks and a study it commissioned in 2019, [Key Considerations for Design and Evaluation of Leadership Development Programs with a Racial Equity and Social Justice Lens](#). Sometimes, the Foundation has been able to incorporate the insights into their work; other times, it has been challenging. Regardless, the Foundation was inspired to share its lessons and insights with the leadership development field, which led to this paper.

This report aims to share key learnings from the Bush Foundation’s experience collaborating with program partners and evaluators to design, implement, and evaluate a leadership program that focuses on advancing equity and inclusion in organizations and communities. The authors focused on what it takes for funders, program partners, and evaluators to work collaboratively with equity at the core of decisions, processes, and interactions. How to build these relationships among the funder, program partners, and evaluator is often not highlighted as part of the system that needs to change in developing leadership development programs with equity at the core.

This experience also surfaced insights on the essential elements needed in such a program. To respect the unique and proprietary work, knowledge, and intellectual property of the program partners, this report will describe the essential elements to build into a program without including specifics of the piloted program. These elements include aligning the goals of the program with the expected and appropriate level(s) of change; and seeking program partners grounded in a framework that not only promotes individual reflection, awareness, and behavior change, but also compels changes at the group, organizational, and system levels in the context of the leaders’ environments. Systems thinking is a critical component, enabling leaders to identify and create solutions to address the root cause of inequities in their organizations and communities. More specifically, the experience highlighted the importance of deepened empathy. With a deepened understanding and practice of empathy, leaders were more likely to internalize and authentically engage with the elements of the curriculum and use their learnings in the organization or community they are seeking to change. Most importantly, this program believed participants came to the Change Networks program already as leaders who wished to be nourished and emboldened to use their knowledge, skills, lived experiences, and power to fulfill their goals for their communities.

However, there is always more work to be done to help leaders develop the ability to identify what a system is and how to create systemic approaches to dismantling racist practices, policies, and programs that span the individual, organizational, community, and network levels.

The Foundation does not claim that the Change Networks pilot was perfect, nor was it expected to be. The Foundation came in with assumptions about leading with equity at the core and learned with the program partners and evaluators how leadership programs can be done, what outcomes are feasible to expect, and what challenges to be prepared for. What they learned from their experience helped inform how the Foundation will intentionally, authentically engage with future partners and evaluators and how they will support leadership programs with equity at the core. The Foundation hopes others in the field find these key learnings helpful for developing and supporting leaders from diverse backgrounds to make systemic change in their local context.

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Contents

Preface	1
Acknowledgments	3
Overview	5
Part 1: Building a partnership among funders, program partners, and evaluators	7
Part 2: Essential elements for cohort-style leadership programs with equity at the core	11
Future directions	17
References	18

Overview

Most leadership programs focus on changing and measuring behaviors at the individual level. They operate under the assumption that one person can change an organization's culture and practices if funders invest in the "right" individual and strengthen their capacities and skills (Riggio, 2008; Watkins, Lyso, & deMarrais, 2011). But in the nation's moment of heightened tensions around racial inequity, and demands for fair and just organizations, funders need to re-envision the definition of a leader and ways to develop and support leaders who can lead with equity and inclusivity. Racial equity is a primary concern; at the same time, racial and ethnic identity intersects with other forms of identities that affect leadership including gender identity, sexual identity, and socioeconomic status. The prevailing assumption that focuses on individualism as the unit of change to strengthen organizations has never been enough to take on the messiness and complexity required for social change. Rather, funders can focus on increasing leaders' ability to lead social change in partnership with many stakeholders, to have a collaborative approach, and to fuel collective action to dismantle structural racism and advance equity at a systems level (Learning for Action, 2016; Littlefield et al., 2002; Wassenaar & Pearce, 2012).

With the creation of the Change Networks program, the Bush Foundation responded to the region's call to action to create more leadership with equity at the core. The Change Networks constitute a new cohort-style leadership program to help leaders build equitable organizations and communities in Minnesota, North Dakota, and South Dakota and the 23 Native nations that share the same geography. The evaluation focused on a pilot program of this leadership program from 2017 to 2019. The program builds the skills of leaders to help them effectively lead systems change in their organizations or communities by centering inclusion and equity, with the intention of supporting leaders to bring and build upon their full spectrum of experiences, abilities, and identities. Leaders also receive funding to develop and implement actions and projects to change the systems of which they are a part. Over one year, a cohort of leaders engaged in a self-reflection process to understand more deeply how they see and experience the world, learn together how to work effectively with people from similar and diverse backgrounds, create a sense of community among leaders within and across cohorts, gain new allies who will support them in their work during the program and beyond, and lead systems level change more equitably and inclusively.

Some of the lessons and insights are not new; they amplify what others in the leadership development field have already shared. The Foundation chose to focus this paper on the lessons and insights that are specific to developing and supporting leaders from diverse backgrounds in Minnesota, North Dakota, and South Dakota, and to its initial hypothesis that a) with sufficient skill-building and support, these leaders can change their organizations' diversity, equity, and inclusion practices; and b) a cohort approach will help to create a network of

leaders with shared understanding about diversity, equity, and inclusion, as well as a community of peers to which they can turn for support.

This report is divided into two major sections. Each section will describe key learnings for funders, program partners, and evaluators to consider when developing a leadership program with equity at the core. The first section describes the groundwork for funders who want to work with program partners and evaluators to plan and develop a leadership development program. This groundwork includes solidifying the process and protocols to establish common expectations and norms for engagement, reflecting, and adjusting midcourse. The second section describes essential elements in any leadership development program that is attempting to cultivate and support leaders who will lead with equity at the core. The report concludes with recommendations for the field to consider as it evolves to serve the next generation of equitable leaders to address complex, messy social issues.



Part 1: Building a partnership among funders, program partners, and evaluators

Based on the Foundation's lessons learned, this section describes what it takes for funders to collaborate with program partners and evaluators to align on desired impact, take the time to build trusting relationships, and establish fair and just processes to engage with one other to plan a leadership development program with equity at the core.

Funders need to engage program partners in selecting the evaluator. Frequently, funders select an evaluator independent of the program partners. This creates an imbalance in power between the program partners and the evaluator from the outset.

More often than not, once a program has been approved by the funder's board, there is a rush to get started and begin implementation right away. Program officers initiate parallel and independent processes to select the program partners and the evaluator. As a result, program partners do not have the opportunity to influence the selection of the evaluators with whom they will work closely. They may perceive the evaluation and the evaluator as an imposition and/or that they solely represent the funder's interest. This perception can have lasting effects on the collaboration among the funder, program partners, and evaluator. The intentionality of funders to set an equitable table from the outset, with clear roles and expectations, is crucial to establish a strong foundation from which to build relationships and trust among all parties.

The dynamics among the funder, program partners, and evaluator are affected by the histories of the identity groups of each, as well as the histories of the sectors they represent.

These histories affect the interactions among all participants and the speed at which trust in the evaluation and evaluator develops. For instance, historical distrust between White and Black people can affect relationship building between Whites and Blacks among the funder, program partners, and evaluator. The history of harm caused by research on people of color can affect trust building between program participants and the evaluator. Recent incidents, such as an act of injustice by White police officers, can sometimes create more contentious interactions among the funder, program partners, and evaluator even when the act had nothing to do with the participants personally.

These histories and contemporary events shape the parties' interactions with one another, resulting in certain differences that are typical in a funder-program partner-evaluator dynamic, such as skepticism about the value of the evaluation, ownership of data, disagreement about the data required by the funder, use of the findings to make grant renewal decisions, and concern about who sees the findings without agreement by all partners. For instance, the funder may require the evaluator to collect data about the race and ethnicity of leaders participating in the program to assess how representative they are of the geographic region—using U.S. Census categories. At the same time, the program partners may feel that these categories are an imposition on people of color and that using them contradicts the equity goals of the leadership program. The power of the funder to collect the data needs to be recognized and all parties should have the opportunity to discuss the implications of the final decision.

To preempt misutilization or underutilization of the evaluation and to increase confidence in the evaluation, evaluators should be prepared to address differences in perspectives about the value of evaluation, ownership of data, dissemination of findings, and use of findings by the funder.

Even if these differences did not explicitly arise in the kickoff or initial meeting, evaluators should work to preempt the tensions that may be caused by these differences. They can do this by presenting their approach to evaluation; how this approach is personally and professionally important for them; and examples of how they have tackled questions about use, data ownership, misuse of findings, and power issues. Evaluators also should discuss with the funder and program partners any experience they have had with evaluation, what they liked or did not like about the evaluator's performance and evaluation design, and how they would like to be engaged in the evaluation. Evaluators can use hypothetical scenarios about the use of findings to make decisions about grant renewal, disagreements about findings, and publication of findings by the evaluator to surface potential tensions and discuss solutions early on.

It takes more time than anticipated to build relationships and trust with the goal of making sure funders, program partners, and the evaluator have shared agreement about their different perspectives on leadership and arrive at a theory of change that everyone can buy into. Build in sufficient resources and time as part of grant agreements and evaluation contracts for relationship and trust building.

The relationship and trust building will not occur in the first meeting or the second meeting. Frequently, the funder, program partners, and evaluator proceed quickly to implement the evaluation plan and their budgets account for a certain number of

meetings to accomplish this. However, the time spent in between meetings or to have unplanned meetings to resolve a disagreement is not budgeted, causing the program partners and the evaluator to exceed their capacities. Also, funders typically have more power and influence in relationships and if this is not recognized and intentionally addressed, a true partnership will be hindered.

The relationship and trust building cannot be compromised. The goal of a leadership program with an equity orientation is, ultimately, to effect change that will bring more fairness and justice in organizations and communities for people historically and currently marginalized and disadvantaged. Shifting systems requires trust to be established before moving into implementation. Funders, program partners, and the evaluator need to agree on the outcomes expected from the leadership program and the level of change possible (e.g., individual, organizational, community). This requires:

- negotiating the different perspectives of the funders and program partners on what leadership can be and the essential skills required of leaders to lead social change;
- agreeing on a realistic time frame at which changes can be seen at the individual level, organizational level, and systems level; and
- aligning all partners' definitions and operationalization of leadership.



Creating a shared vision or theory of change will help unearth implicit assumptions about aspects of the curriculum. This activity will also ensure there is alignment between the desired outcomes for the leaders as a result of the program and their level of change as a result of their leadership.

It is crucial to designate a role and allocate resources for a person in the team to document key decisions and steps during the collaboration among the funder, program partners, and evaluator.

It is critical to understand how evaluation findings generate insights that will in turn inform decisions about program adaptation, improvement, and perhaps even drastic pivots. Early on in the evaluation, there should be explicit agreement among the funder, program partners, and evaluator about what decisions are important to document, and who should be responsible for the documentation to accurately reflect the stories and lessons that will be shared with others. These include decisions made when all three parties are together as well as decisions that the funder and program partners make on their own. The documentation is useful to ensure:

- full understanding about the complexity of strengthening and supporting leaders to lead with an equity lens,
- accurate recollection of decisions made as time goes by and if there is any staff turnover among the funder, partners, and evaluator, and
- awareness of how all the parties' thinking evolved and accountability in how the funder, program partner, and evaluation pivoted or did not pivot in their activities.

The documentation process is important and only one of the ingredients for building relationships and chronicling the unanticipated turns in the pathway of change. It is equally important that everyone on the funder, program, and evaluation teams be mindful of their own personal journeys to promote, support, and advocate for equity journey and how where they are in their journeys shape their role and participation in the program. This awareness creates compassion for individual growth and opportunity for deepening their relationships with one another.



Part 2: Essential elements for cohort-style leadership programs with equity at the core

This section will describe the elements that are essential for building a cohort-style leadership program with equity at the core.

Provide clear expectations of behaviors and actions required to build authentic, trusting peer-learning environments.

Equity and inclusion work is hard. It evokes many feelings and thoughts; people may be defensive, afraid to say something that could be perceived as wrong or politically incorrect, tentative to challenge, or afraid of being shunned and “othered.” And yet, equity work holds the potential for joy and imagination of what futures are possible when working with people who are different and similar from one another. A safe and trusting environment is one way to foster self-reflection and leaders’ willingness to listen and work with people who have different identities, values, or opinions than themselves. Fostering and cultivating authentic engagement also provides leaders with the vocabulary to explicitly describe what is creating inequities, where these inequities exist in their organizations, communities, or lived experiences, and to make choices that center equity. Also, a leadership program that centers equity can be a new experience for some leaders—a factor that is often overlooked. Acknowledgement of this factor is important for assisting these leaders navigate new feelings and experiences while engaging in relationship building inside a network.

Program partners set the tone and establish structures and processes that encourage leaders to engage in self-discovery and share openly their experiences and concerns. An emphasis on authentic and transparent engagement, modeled by the program partners, contributes to leaders’ confidence in engaging in difficult conversations about diversity, inclusivity, and equity, and their biases, assumptions, and cultural identities. Equally as important is to demonstrate a group norm, actively listen and share, and respectfully interact, as well as the repairing and healing process when fellow leaders do not engage respectfully.

Provide opportunities that enable leaders to learn how to be self-aware of their own thoughts, feelings, and actions. It is important that leaders understand how to be intentional about cultivating empathy to enable people to be open and willing to understand one other, even when they may not agree.

Empathy is the ability to sense other people's emotions, coupled with the ability to imagine what someone else might be feeling or thinking (greatergood.berkeley.edu, 2021). Empathy is critical for making progress toward equity because it affects whether individuals, organizations, or communities take action and, if so, what kind of action they take (Zaki, 2019). Deepened empathy increases leaders' ability to recognize inequities in their organizations or communities and identify the levers of change they can activate to make a difference.

Building leaders' capacity for empathy needs to be a central element of equity-focused leadership development programs. This includes activities that encourage leaders to interact with one other, listen to and exchange life stories, and learn about the histories and experiences of other communities. It is also an outcome to explore. The power of a cohort is the ability to practice engaging across differences and reduce the anxiety of making a mistake or being misunderstood. With deepened empathy, leaders can see the struggles of other people, which will then lead them to see how people are treated unfairly and feel ownership in demanding justice for communities to which they belong.

Leaders must reflect on their own cultural identities and how different factors shaped that identity.

Culture can be associated with race/ethnicity and some White people have spent less or no time thinking about their culture and how it informs their identity, which affects their interactions with others and their own leadership approach. Leaders need to understand the cultural factors that inform their identities and how their culture shaped their view of people different from them, their interactions, their definitions of leadership, their approaches to solving problems, and their responses to unfairness and injustice. A strong sense of cultural identity can also help leaders better understand their interactions with others and their leadership styles. Again, the power of cohort-style programs creates intentional spaces for leaders to engage in discussions and exchanges with peers across racial identities, generations, and geographies to develop a more nuanced understanding of the experiences of others and learn to see difference as an asset, not an obstacle, and even understand how to be allies. Providing tools to help leaders assess and develop intercultural competence can enhance their leadership skills and their interactions with cultures different from their own.



Leading for racial equity will look different for leaders of Color compared with White leaders, and program partners need awareness of the different situations people face in their communities and organizations.

Pay close attention to the different experiences leaders have based on race and geography and how the experiences shape their aspirations, goals, and expectations. For example, leaders of color may not be able to be explicit about their stances on equity and organizational policies for fear of retaliation or being dismissed as “always playing the race card” – especially in White-dominant spaces. Leaders of Color face the challenge of combatting stereotypes and unequal power dynamics in organizations and communities while at the same time combatting the effects of these same forces in their daily and personal lives. Leaders can draw upon their peers and program partners to identify how to navigate different organizational contexts and dynamics, and how to establish allies and champions inside the organization to support their efforts.

Build leaders’ knowledge about current and historical systems that reproduce inequities and about their ability to communicate the uneven impact.

Leaders need time to understand and think about the impact of systems of inequalities, for without this understanding, it’s hard for them to understand how to tackle racism, beyond interpersonal racism. Knowledge of the structural, institutional, and cultural systems helps leaders to understand the root of the problems we see and experience today and the origins of those inequities. Leaders must understand that individuals are not born racist or anti-racist; rather it is the set of choices and policies that may have gone unexamined that result in a systematic continuation of racial and social inequities (Kendi, 2019). These choices require ongoing self-awareness by leaders and their deepened empathy as action-oriented behaviors (as discussed in the previous section) to undo aspects of dominant culture and systems of oppression in their organizations and communities.

Any leadership development program will need to enhance leaders’ understanding of what a system is and how systems of oppression affect communities of color disproportionately (Kim & Kunreuther, 2012). Explicit conversations about structural racism help leaders increase their knowledge about how systemic inequities can play out in their organizations and communities. Leaders begin to see their opportunities of influence as part of broader systems. These conversations also help leaders connect with ongoing systems change efforts in their communities and engage followers or supporters by linking the consequences of structural racism to the daily experiences of those followers or supporters. Leaders must have the ability to consider the impact of these policies on another person similar or different to themselves. This ability will shift leaders to focus on outcome-based

strategies, centering the persons or communities impacted by racism, to get at the root cause of the inequity (as described in the previous section), and working to build collective effort to change those policies and practices (which is described later in this section).

To be an equitable leader is to understand the required daily commitment to make conscious unbiased choices in all aspects of an organization or community's practice, policies, and cultural norms (Kendi, 2019). People are shaped by the norms, narratives, and systems surrounding them and may unconsciously and inadvertently perpetuate biases and inequities. Therefore, it is critical for leaders to learn how to recognize and communicate policies (e.g., redlining in housing, immigration legal and policies that create barriers, inequitable education practice and pay and limited access to quality medical care) that produce racial and other forms of injustice, disparities, and inequities that disproportionately impact people of color in their organizations and communities (Kendi, 2019).

Leaders need training and skills to understand how to navigate power and effect systems change.



Making progress toward equity requires navigating and shifting power structures to bring about systems change and address the root causes of inequities. Therefore, equity-focused leadership development curricula need to integrate content on how power is built, operates, and is maintained at different levels (organization, community, etc.). Understanding these dynamics will be key if leaders are to navigate conflict, exert influence, and shift power in their organizational and community spaces (Bordas, 2007; Pigg, 2013). As the program increases these skills in leaders, there will be some cases where leaders outgrow their current roles. Similarly, drawing leaders' attention to social justice issues can motivate them to seek opportunities where they can have a broader, more meaningful impact on equity and systems change. Some leaders will leave their organizations, but this should not necessarily be considered a negative outcome in cases where leaders are in search of opportunities to flourish and effect systems change.

Equity-focused leadership development programs must also help leaders navigate power structures by enhancing their skills in conflict identification, management, and resolution. This capacity elevates how leaders can successfully manage difficult conversations and how to leverage their networks and allies to build power and effect change.

Leaders will need a variety of mentors outside of the program to support them personally and professionally during their journeys.

People are multifaceted and, as leaders, will need support for many reasons (e.g., new to a leadership role, personal support), and rarely can one mentor fulfill those various roles. Mentors help leaders make sense of the knowledge and skills acquired through the program and help them reflect on how they can apply these new or renewed capacities in their organizations and communities. Therefore, leadership development programs can include strategies to help leaders select appropriate external mentors including the types of support they are seeking from each mentor (e.g., advice, networking).



Organizational champions, mentors, and community leaders strengthen the support system for leaders and contribute to the geographic sense of community. They can help to set the tone for leaders to start and sustain their change strategies and can open doors for them to lead and to get their ideas heard within the organization or community. Mentors can also provide accountability as leaders consider whether their approaches are equitable and inclusive and to what extent.

Building a sense of community is essential within and across program cohorts because leaders often find the experience of speaking up about inequity to be isolating, especially when they tend to live and work in places that are not ready for change.

Relationships with peers are an important contributor to leaders' transformation processes. Once the program is over, leaders need to feel like they belong to a community of individuals linked together by a common experience that provides mutual support and guidance. By participating in the program, leaders begin to define "their" community broader than a geographic location to include "their people"—people with whom they find a safe space to learn, share, and garner support. Both structured and unstructured activities during program implementation are key to cultivating a sense of community among leaders. Moreover, belonging to this type of community allows equity-oriented leaders to feel more capable in championing social justice causes in their organizations and their communities.

Be mindful that historical locations or settings can help leaders to understand the histories of oppressed people but can also trigger emotions among program participants.

There are many choices program partners make that reflect their understanding of equity. All of these choices—from location accessibility and food to guest speakers and language of the supporting materials—help model equity and exhibit skills around operationalizing it. History is an important part of learning and, often, places, buildings, settings embody the histories of different people; at the same time, they can trigger emotions for people whose ancestors were part of that history (Bilewicz & Wojcik, 2018). To prevent unintended harm, consulting with stakeholders and leaders of communities most affected by local inequities can help to identify places for program activities that contribute to promoting a supportive program environment for leaders. For long-standing programs, program partners can consult with alumni as part of the development of program activities. They can use alumni experiences to provide insights and feedback on curriculum design and meeting locations.

Future directions

The field of leadership development is growing across the country as more funders commit to supporting leaders who can lead with equity at the core. Leadership development programs designed to develop and support equity-focused leaders attempt to strengthen those leaders' ability to understand systems, build deepened empathy, and take action to address inequities in the organizations and communities of which they may be a part. Programs organized in a cohort structure foster a sense of belonging and shared accountability that supports individual leaders' capacity to change the systems that perpetuate racial inequity and social injustice.

However, as noted throughout this report, despite intending to disrupt systems and advance racial equity, most leadership development programs continue to focus on producing and tracking outcomes at the individual level. There is limited knowledge about program components that correlate with outcomes beyond the individual participant. The frameworks and methods used by evaluations of leadership development programs often concentrate on tracking

individual-level changes, such as knowledge acquisition, skill development, and changes in mindsets. Evaluation approaches need to consider the time required for supporting leaders over extended periods of time and building the network of change agents. Evaluations should examine community outcomes over a long span of time and capture measures of sustained systemic change. Increasing the field's capacity to cultivate leaders who actively work toward racial equity requires linking the program's effect on the individual participant with changes in organizations and communities.

This report ends with how it started, equity must be a part of any leadership development program, and the Foundation hopes that these key learnings are useful to any funders, program partners, and evaluators on their journey to create equity-centered leadership as a required skill to imagine new ways of leading organizations and communities.



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