



# **Leadership Development in the Program for the Rural Carolinas**

**Chapin Hall Center for Children  
at The University of Chicago**

**on behalf of The Duke Endowment**

**December 2004**

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## **From The Duke Endowment**

We entered new ground while traversing old trails. The Endowment has been working with rural churches and rural hospitals since its inception and for over 80 years. We take this work very seriously.

Working in concert with our traditional beneficiaries, in August 2001, the Board of Trustees of The Duke Endowment approved the creation of the Program for the Rural Carolinas, an effort to help rural communities in the Carolinas develop their economic assets. The rural program was a three-year initiative and operated on the principle of helping traditional Endowment beneficiaries develop partnerships with other agencies in their communities to work together on a common goal. We believe our beneficiaries and their work will prosper when their communities experience healthy growth and economic stability.

This program was divided into two parts: Option 1, for rural communities demonstrating the ability to undertake large-scale collaborative efforts to energize community development and strengthen economic vitality, and Option 2, for rural communities that choose to undertake innovative smaller-scale projects with fewer partners but still with the potential for economic and community impact. Both groups received direct grants and assistance from the Endowment, as well as coaching, skills training and other assistance from MDC Inc., the Chapel Hill-based economic research and workforce development agency that is the Endowment's partner in managing the program.

Chapin Hall at the University of Chicago was another partner. They worked with participants in the Program – the sites, The Duke Endowment, and MDC – to establish a way to learn systematically from the planning and implementation of Program activities and to assess the successes and challenges the Program encounters. This learning and assessment provided information and analysis useful to participants as they refined and implemented their work and, potentially, to inform people and organizations working in other communities.

The Endowment selected 22 sites that received funding in 2002. Two sites withdrew in 2003 and 2004. Twenty sites participated through 2005, 14 sites are in a second phase with a focus on sustainability. The program will end in 2007. We learned much from this program and want to share this information with those interested in helping rural communities develop their economic assets, how rural churches and hospitals can have a role in this work and lessons we learned about managing a program of this scale.

Sincerely,

Eugene W. Cochrane, Jr.  
President

Toni L. Freeman  
Director of Project Research and Evaluation

May 2006

## Participating Programs

The Endowment received 93 completed applications for the program, 57 from North Carolina and 36 from South Carolina. Staff members from the Endowment and MDC reviewed applications and made site visits to the communities submitting the most promising proposals we compared findings in a series of meetings and conference calls. In June 2002, Trustees of the Endowment selected 22 sites that would receive funding under the program. Two sites withdrew by 2005 and 14 sites are in the final phase of the program that will end in 2007. A complete list of the participating beneficiaries and their programs is in Appendix A.

Beneficiary	Service Area County
Allendale County Hospital	Allendale County, SC
Calvary Memorial United Methodist Church	Greene County, NC
Columbus County Hospital	Columbus County, NC
Duncan Memorial United Methodist Church	Georgetown, SC
Greenville District United Methodist Church	Beaufort County, NC
Hildebran United Methodist Church	Burke County, NC
Hinton Rural Life Center	Cherokee, Clay, Graham & Swain Counties, NC
Hot Springs Health Center	Madison County, NC
Hyde County Cooperative Parish (United Methodist Church)	Hyde County, NC
Isaiah United Methodist Church	Colleton County, SC
Maria Parham Hospital	Vance County, NC
Marion County Medical Center	Marion County, SC
North Wilkesboro District United Methodist Church	Alleghany, Ashe & Wilkes Counties, NC
Onslow Memorial Hospital	Onslow County, NC
Pender Memorial Hospital	Pender County, NC
Pilmoor United Methodist Church	Camden & Currituck Counties, NC
Pinetop United Methodist Church	Edgecombe County, NC
Randolph Hospital	Randolph County, NC
Roanoke Chowan Hospital	Bertie, Gates, Hertford & Northampton Counties, NC
The Rockingham District United Methodist Church	Robeson County, NC
Shady Grove United Methodist Church	Lower Orangeburg & Upper Dorchester Counties, NC
Snow Hill United Methodist Church	Stokes County, NC

## **Introduction to the Chapin Hall Learning Project Working Memoranda March 2006**

One of the products of the Chapin Hall Learning Project is a series of Working Memoranda that serve as a vehicle for dialogue about what the Program for the Rural Carolinas (PRC) is accomplishing, what challenges it is facing, and what strategies might help to address these challenges in order to maximize impact. This Introduction describes the purpose of the Working Memoranda, how they were developed, and what they have focused on.

### **What is the purpose of the Working Memoranda?**

The goal of the Working Memoranda is to provide useful information and analysis designed to stimulate mutual reflection and learning about key questions and issues arising as PRC evolved. As expected, significant variation existed across the original 23 (now 20) PRC sites in their histories and contexts, strengths and challenges, and in the local opportunities on which they had to build. Our analysis was at the cross-site level whereby we aimed to draw from the unique experiences of individual sites to identify larger patterns, themes, and lessons. Our focus on learning rather than on assessment positioned us to be learning partners rather than evaluators, although we hoped that the issues covered in the Memoranda helped to shape each site's own self-evaluation.

The Working Memoranda are conceptualized as a collaborative effort, so we periodically asked all of PRC's stakeholders what questions they wanted the Memoranda to address. When we completed a Memorandum, we issued it in draft form so that everyone had an opportunity to review and provide input before it was finalized. We encouraged the sites to review the draft to see where their experience was consistent or not with the narrative: what was the evidence for their assessment? What other confirming or competing points or lessons on the topic could they contribute? What examples could they provide to help deepen the learning from PRC?

Because our aim was to capture the learning along the way, each Memorandum should be understood in the context of the particular stage of PRC's development in which it was released. Sometimes information was updated in later Memoranda and sometimes the same issue was treated quite differently in Memoranda that came out at different times.

### **On what data are the Working Memoranda based?**

The Working Memoranda are based on a number of sources of data collected over a three-year period starting in April 2003: at least two site visits annually to the Option 1 sites, during which Learning Project staff attended team meetings and community events and interviewed team members, staff, local officials, program participants, and other observers. We also read site materials, communicated with team members and staff by phone and email; attended learning cluster workshops and annual cross-site learning institutes; administered surveys; talked periodically with MDC staff and coaches; and interviewed relevant program staff at The Duke Endowment.

## **Who is the audience for the Working Memoranda?**

PRC teams, staff and other local stakeholders are a primary audience for the Working Memoranda. Other key audiences include The Duke Endowment and MDC. Finally, the memoranda may also be of interest to other practitioners, funders and policymakers concerned with rural economic development, community building, and the role of philanthropy in community change. A list of the working memoranda topics is in Appendix B.

### **Chapin Hall Center for Children at the University of Chicago**

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## Leadership Development in the Program for the Rural Carolinas December 2004



### Introduction

As described at the September 2003 Learning Gathering in Fayetteville, the Program for the Rural Carolinas (PRC) seeks to engage *different* people making *different* decisions in *different* ways for *different* results. Building new cadres of leaders to support the process of change is therefore fundamental to PRC's approach to improving the economic well being of rural communities. Identifying people who have the time, energy and passion to devote to becoming community leaders and fostering intentional strategies to develop their leadership and engage them in the community change process are twin challenges for the PRC teams.<sup>1</sup>

This Working Memorandum explores how teams define leadership development and their goals for it, whom they have targeted, and the strategies they have used to reach these target populations. We look at both the formal and informal ways in which PRC teams have attempted to build leadership in their communities, how leadership development is linked to PRC programmatic efforts and outcomes in the community, and finally what the teams are doing to help make room for new leadership, both internally and in the larger community.

### Defining “Leader” and Leadership Development in PRC

Leaders are people who get things done, who can mobilize a constituency and catalyze action. As opposed to the “great man” tradition of leadership, most leaders in community contexts are ordinary citizens who take responsibility for the day-to-day activities that support community life. Invested in the community's well being, they are willing and able to assume some responsibility for initiating and facilitating action to help address community problems and create a more promising future for themselves and their fellow citizens.

Within the PRC context, there are several different groups of potential leaders who can be identified, engaged, encouraged, trained, and supported. For each group, we give some examples of “new” or emerging leaders who sit on a PRC committee or are otherwise involved in a team's work.

1. Those who are socially and economically marginalized and who, in the past, may have been overlooked as potential leaders. PRC refers to this group as *people left behind by the economy*.
  - A struggling farmer who is looking for ways to increase his income and get more return from his land.
  - A woman who has been laid off from her job and is interested in becoming an entrepreneur who produces and sells a specialty craft item.

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<sup>1</sup> MDC's “Strengthening the Rural Carolinas: A Conceptual Framework for the Program for the Rural Carolinas,” June 2002, p. 9.



- A single parent who joins the PRC staff to improve opportunities for the whole community as well as her own.
2. *Individuals who work in organizations and agencies that serve people left behind* by the economy but who, prior to PRC, have not taken a leadership role by collaborating with others to promote economic and community improvement.
    - An individual working for a regional planning organization who becomes interested in educational reform to reduce high school dropout and prepare young people for jobs.
    - A social service nonprofit employee with a background in counseling and management whose eyes are opening to the complex process of community economic development.
    - An urban-based community college official looking for strategies and opportunities to reach the part of their service territory that includes rural areas.
  3. Individuals who work in a variety of jobs not directly related to people left behind by the economy who *express a new interest in working with others to promote economic and community improvement*.
    - A real estate agent who volunteers to be on a local housing action committee concerned with promoting affordable housing in the county.
    - A local merchant who begins to see how a particular project he is working on with the county could also serve as a training opportunity for unemployed workers.
  4. *Traditional leaders* who have the power, networks and access to move a social change agenda forward but, to date, haven't focused their energy in this way.
    - A banker who joins an IDA committee and agrees to provide banking services free of charge for IDA accounts.
    - A county official who develops interest in small businesses as one means for economic development and becomes an advocate for the development of a small business incubator.

While these individuals may not have been champions for addressing the issues affecting people left behind by the economy prior to PRC's inception, PRC gatherings, literature, and trainings as well as engagement with the PRC teams create an opportunity for them to step into this role. PRC's intent is not to privilege one of these groups over the others for leadership development, but rather to build cadres of leaders representing diverse sectors and interests in the community to support the process of community change. All of these different kinds of citizens are necessary constituents of a long-term partnership to advance and sustain PRC's goals and interests over time.

Because PRC requires the involvement of diverse leaders, it must also have diverse strategies to identify, engage, and develop that leadership. For example:

- Some individuals may need *new skills, new knowledge, and exposure* to new community networks and resources.

- Others may need *inspiration and support* to contribute in ways that reinforce their emerging passion and build their capacity to impact key community issues.
- Still others, responding to pressure from constituencies who vote or consume goods, may need *new understanding* about how their interests coincide with PRC's agenda.

The challenge for PRC sites is to design leadership development strategies that are well matched to the different groups of potential leaders they are trying to target and to the community outcomes they are trying to achieve.

## Why Leadership Development?

The importance of leadership development and its role as a necessary ingredient for pursuing PRC's goals was clearly articulated by a number of individuals interviewed. In a practical sense, many people linked leadership development to getting work done. By identifying and cultivating a cadre of people who are passionate about and committed to the goals of PRC, the team has more people invested in and working towards achieving those goals. *"Since we can't do it all, we have to identify leaders in the community to do it."* Team members were realistic that in many cases, in addition to identifying individuals with the potential to lead, they must help stimulate the confidence and commitment to do it, *"My perspective is that there are people out there who could lead with just a little encouragement."* Some people took a longer term view of leadership development and expressed its importance in terms of sustainability – if more people are involved at a deep level as the PRC moves forward, the program will more likely survive into the future, after TDE's involvement. *"It's to make sure that the project can continue beyond the life of the grant. We need to identify, train, and nurture people who can be leaders to help sustain the project."*

Although less tangible, a number of interviewees talked about the inspiration and change of orientation that PRC leadership development introduces into the community. *"Our county needs processes and initiatives that will inspire the imagination of the county."* The role that leadership development plays in better connecting individuals and their communities to information, resources, and opportunities can both broaden a community's concept of the possible and help it adopt new ideas and strategies for moving forward. *"The opportunity that I see with this project is that it's created a recognition that if we don't do things differently, help people to pursue more than mediocrity, we're going to be stuck in the same rut that we're in . . . Our greatest resource is our human resource."*

## Formal and Informal Leadership Development Programs in PRC

Although PRC sites endorse leadership development as a key component of their agendas, the experience of the Option 1 sites to date of *implementing* leadership-building strategies is somewhat limited. Two of the PRC teams have implemented formal leadership development programs (described below) and while there appear to be opportunities for informal leadership development of team members and other community members through subcommittee participation, mentoring, and hands-on training, most teams have not yet developed *intentional* strategies for doing so. Intentional informal efforts thus far have focused mostly on building

team and subcommittee members' knowledge and networks and strengthening their collective capacity to collaborate around a common agenda.

To date, none of the sites has developed or implemented formal or informal leadership programs explicitly targeting people left behind by the economy, although several sites plan to do so in the future. Similarly, while we can point to team plans to pursue community engagement that includes actively seeking out and cultivating local leaders and people who can assume increased leadership in their communities, no sites are currently implementing such strategies.

*Formal approaches.* Both the Northwest and Randolph sites sponsor formal leadership development programs that draw upon the Chamber of Commerce model. These programs recruit diverse groups of public, private and nonprofit sector individuals who could be seen as the community's future leaders. In both cases, PRC reached out to some nontraditional settings like churches and nonprofits for participant recommendations so that the group would not be dominated by the business and industry sectors, as is the case in some Chamber programs. As one team member noted, *"We are reaching out to those in the community who are not typically in leadership roles, but who have the potential and interest to get involved. Our plan is to take these folks and not only give them the skills and tools, but also the encouragement to accept leadership responsibilities in their communities."*

Like the traditional Chamber programs, both the Northwest and Randolph leadership program curricula are structured around helping participants learn about the political, social and economic workings of the county and providing them with the visibility, connections and know-how to open previously closed doors and make things happen. In addition, anticipating some participants will come to the program with less formal education than others, the Randolph leadership program enhanced the traditional Chamber program to include sessions on personal development and skill building at the individual level. The Ashe County program was structured around the "building blocks" of economic development, as well as some personal skills development. After a day-and-a-half retreat, each of the half-day sessions focused on a particular dimension of the cycle of development—business and workforce development, and the physical, cultural, social and civic infrastructure of the county.

*"It was so interesting to be sitting with doctors and bankers and people in the arts and get such a clear idea about how this county works and how we could make it work better."*

*"I was able to make a lot of contacts so that when I need something on the job, I pretty much know who to call or what services are available for folks."*

*"I found the program very helpful and I'm hoping to help do a similar leadership development session at my church."*

Randolph has graduated two leadership classes, and plans to support four a year. Based on the experiences of the first classes, RPRC is reaching further to identify and include more people of Hispanic origin and people from a broader base of the county, rather than just the "urban centers." To achieve these goals, the team has begun conversations that will allow it to bring the program to the community rather than having the community come to it. Branching out from one central location will necessitate more outreach for participants and partnership building with

community institutions, including Hispanic church congregations, throughout the county. It will also help the program build a stronger base for sustainability in the community (see text box on next page).

The financing of these leadership programs is not a huge burden because PRC funds can leverage matching funds and in-kind contributions from many of the settings in which participants work, as well as other community organizations. In 2003, Northwest's contribution of \$7,000 in scholarships for the Ashe Leadership Challenge at the Chamber of Commerce meant that an estimated 7 of the 17 participants who did not have industry/business sponsors could join the program. NAPRC also contributed \$1,000 to the already established Wilkes Chamber Program. In 2004 NAPRC will continue support for the Ashe program (\$4,500) and

**Plans for sustainability: Northwest's Leadership Programs**

While the institutionalization of the program at the Ashe Chamber will be promoted by an alumni group that will support the program financially and programmatically, ultimately NAPRC aims to create a new cohort of regional leaders not limited by their county identities. One strategy is through scholarships to Leadership Program graduates for the North Carolina Rural Center's Economic Development Institute which provides exposure to regional and statewide perspectives. In 2003, NAPRC provided two such scholarships for Ashe County program graduates and hopes to provide them for both the Alleghany and Ashe graduates in 2004. NAPRC will also hold a common retreat and final graduation for these two programs, as well as some regional events, to encourage participants to think and act regionally.

add support for a Leadership Program in Alleghany County, actually running the program itself to get it off the ground. The RPRC Leadership Program, which is run entirely by RPRC, spent \$4,000 for its first cohort of 18 people in 2003. By changing the course based on feedback from the first cohort, RPRC decreased the cost for the second cohort of 13 people to approximately \$2,500. RPRC has also earmarked funds to offer

scholarships to graduates of the RPRC Leadership Program who apply and are accepted into Chamber-sponsored leadership programs in the county.

***Challenges and Opportunities for Formal Leadership Programs.*** As the examples on this page illustrate, there are different paths to sustainability for leadership programs, including institutionalization within partner communities and/or organizations. Because PRC is a dynamic process that must periodically modify and adapt in order to effectively pursue its goals, PRC sites must select partners for its leadership program that share its values and mirror its flexibility through willingness to modify curricula, outreach strategies, and approaches to ensure that the program successfully supports and reinforces the PRC initiative as it evolves. Some chamber programs for example, would have neither the capacity nor interest in modifying and adapting to respond to the PRC goals.

**Plans for sustainability: Randolph's Leadership Program**

Although the RPRC leadership program is based on the Chamber model, the Asheboro Chamber of Commerce does not intend to assume responsibility for it long-term. Rather, the RPRC leadership development committee's vision is to integrate the program into different communities throughout the county, "... *There's more value in having the community involved in this. As the programs evolve out into the communities and are based in church fellowship halls, it'll become their own thing, they buy into it and they'll be proud of it.*" The RPRC, with support from leadership program graduates, expects to help chambers in other municipalities, associations of churches, and other groups raise funds for and operate the program on an ongoing basis. This will contribute towards creating a base for sustained programming.

A clear advantage from the perspective of both the Northwest and Randolph respondents is that with fairly modest effort, the

widely respected Chamber programs can be tweaked in focus and expanded in participant diversity in order to promote PRC leadership development goals. These programs also create a cohort of leaders who can support and network with each other long after the program ends. Given the similarities, however, PRC leadership programs modeled after Chamber programs would want to ensure that differences were clearly articulated, so as to avoid perceptions of competition with existing programs. A disadvantage voiced by some is that this kind of program tends to focus largely on middle-class people and people who already have the motivation to participate rather than those for whom participation in a leadership program represents a significant new opportunity and who might bring a different perspective to the table. *“I get the impression that the team just wants to reach people in general without really targeting anyone in particular. This approach is just going to bring in people who already have initiative and are self-motivated...But this is where people get left behind. We need to be going after the ones who aren't coming, not the ones that are going to get it on their own.”*

To be truly effective, PRC sites must link their leadership program efforts to PRC's intended outcomes and follow up with program graduates in ways that encourage and enable them to become engaged in promoting these outcomes. Individual PRC team members can play critical roles by using their own contacts and networks to facilitate and broker leadership opportunities for leadership program graduates. “It's not enough for people to say that the training was enlightening and opened up their horizons – we need to find ways to open up the opportunities (at the very least our own subcommittees) or the training will not have been beneficial to the community.” While PRC teams may need to provide guidance and support for graduates in some cases, in others, graduates may make take the initiative and make the linkages on their own. The example below describes how a group of graduates from the Randolph Leadership Program have applied their leadership skills to undertake a community project.

#### **Town of Liberty RPRC Leadership Program Graduates**

Graduates of the first RPRC Leadership class from Liberty, North Carolina have organized with the assistance of an RPRC team member around the goal of acquiring an unutilized school in Liberty to renovate and use it as an Early Childhood Center that would provide supportive services to small children and their families. During segregation the school served the town's African American population. The graduates have involved two churches in their efforts and are reaching out to alumni of the school for their support and involvement. A feasibility study will help the group to decide if and how to move forward with the project. RPRC hopes to capitalize on the energy of these community members and develop alternative community projects if the school project is not feasible.

The example above demonstrates how a formal leadership program can be linked directly with overall outcomes PRC is trying to achieve and stimulate in communities and also highlights:

- The opportunity for its graduates to lead in a hands-on way through on-the-ground community activity that is consistent with the goals of PRC.
- The mentoring role that PRC team members might play following the formal program process – as a means for further enhancing leadership capacity, maintaining connection among program graduates, and encouraging graduates to continue PRC-oriented work in their own communities.



- The potential for Leadership Programs to go beyond information sharing and networking, which alone will not result in the community change PRC is pursuing.

***Informal leadership development of team members.*** The benefits of assuming leadership responsibilities in PRC are numerous and include opportunities for networking, sharing information with a broad base of people, and being exposed to new information from the outside. This is in addition to the less tangible benefits that come with the knowledge that one is making a contribution to one’s community. In order to do the kind of work being asked by the PRC and take advantage of these benefits, however, team members must have their skills honed. In addition, they must have a passion for and a commitment to collaborative community change work, and an understanding of the big picture, all of which reinforce their capacity, as well as their desire, to lead.

*“How do we get it across that this project is so important that you wouldn’t not want to be involved? [Our challenge is] getting people to understand the huge importance of what we’re doing, making PRC something they want to make time to do.”*

***Broad-based team development.*** While few sites have *intentional* informal leadership development strategies that extend beyond the team membership, almost all of them have focused on developing the skills and the passion for leadership inside of the team. All of the teams have received assistance for internal team leadership development from their coaches, outside consultants, and consultants in the PRC technical assistance pool and a number of them have conducted team retreats to help develop the team’s leadership capacity. For example, LO/UD-Shady Grove, Vance, Beaufort, Marion, and Far West have all conducted team retreats focused on planning, communication, identifying and utilizing team “assets,” and general team building.

***Mentoring.*** As illustrated in the text box to the right, mentoring is the most common means we observed for helping *individuals* on teams emerge as leaders. Some coaches have played important roles in mentoring individual team members and staff to assume the leadership for everything from running effective meetings to successfully launching programmatic campaigns. In other cases, team members (usually the program or subcommittee chairs) or other staff members have also taken responsibility for mentoring staff and other team members.

This one-on-one mentoring not only builds skills, but also bolsters confidence of individuals who may not have had previous leadership experience. The focus on building the leadership capacity of the team staff in many cases results in building local leadership for community development and community change, as most staff members reside in the PRC communities for which they work.

- The coach and lead staff person for BCPRC, “The coach is not just adding capacity, she’s helping to build mine and other team member’s.”
- The chair and team coordinator for RPRC, “I’m expanding my skills in this job and doing things like public speaking which I’ve never done before. I would say I pick up things from a number of team members, but the chair is my main mentor.”
- The FWMEP executive director and Vista volunteer, who is being mentored to take on primary leadership for the Heritage team.

In addition to informal mentoring, some teams have also invested in formal leadership training for its staff people and selected team members. For example, BCPRC and Team Vance each sent two people to the North Carolina Rural Center's Economic Development Institute, a well-known leadership program for North Carolina's rural residents.

### *Informal leadership development of non-team members.*

Some teams have taken opportunities for developing leadership for non-team members in the community by encouraging participation in team subcommittees or through community engagement efforts. For example, Far West has established a housing action team of local volunteers in each of the four counties that make up the Far West PRC initiative. These teams are responsible for developing an affordable housing agenda that involves home repair and new construction carried out largely by a growing volunteer base, as well as young people hired as apprentices for the summer. Each team has subcommittees for such tasks as worksite management, volunteer recruitment and publicity. The FWMEP staff person has organized these teams as one way to identify and support new leadership: *"My job is to find the 3 or 4 people on each team who are ready to take on more responsibility, who don't shy away from the work and nurture them to take leadership on their team."* This kind of intentional approach to leadership development takes keen human relations skills and a good sense of timing on the part of staff, but is highly consistent with PRC goals and essential from a practical perspective if FWMEP is to work in a four-county area.

Another example of leadership development of non-team members, and in particular people left behind, is the Oversight and Assessment committee that LO/UD-Shady Grove has established. It is composed of two CNA program graduates, three management team members, and a local employer. The purpose of the committee is to train program graduates to provide feedback on their experiences of the training and the subsequent job placements. This committee's feedback and recommendations will help LO/UD-Shady Grove refine its training programs with input from the trainee, worker, and employer perspectives. Participation in the committee offers its members opportunities to reflect, assess, and provide input on the design of LO/UD-Shady Grove's programs. In hopes of maximizing participation, the committee will meet in the evenings, rather than daytime work hours, and will provide dinner for those who attend.

## **Looking Forward**

1. In this memorandum we have highlighted formal and informal leadership development efforts underway in the PRC, but it is important to note that our interviews indicated a number of such efforts in the planning stages. Most teams talked about engaging PRC-program participants (largely people left behind by the economy) in different in subcommittees as a means for informal leadership development. Below are other plans described by teams:
  - Team Vance plans to conduct a series of listening sessions through which they would target / recruit people for grassroots leadership development.

- RPRC is merging its community engagement committee with its leadership development committee to promote a more hands-on, community orientation, where people would get involved in initiating and implementing projects in their own communities.
- Beaufort plans to hire a part time community engagement person to look for and cultivate local leaders and people who can assume increased leadership in their communities and eventually take it on in the project.

We will look forward to following the progress and development of these initiatives and how the PRC agenda is furthered as a result of them.

2. The long-term and largely intangible nature of the benefits that result from leadership development activities make it hard to gauge their impacts, although not impossible. One support in this effort would be for teams to identify and articulate the strategies they are using, particularly for informal leadership development. Much of the work teams are doing around team building, community engagement, and program implementation might be considered leadership development, but because they have not been identified as such, teams might not be tracking progress and impacts relative to them. Developing a self-monitoring program that includes formal and informal leadership might enable teams to link their leadership efforts to programmatic outcomes.
3. For the most part, people left behind by the economy have been underrepresented in team's leadership development efforts. How can the teams develop effective strategies to increase attention to this group? Such strategies will likely take more time, need to involve a diverse range of partners, and require a strategy informed by an understanding of the challenges this group faces in participating in leadership development activities and in asserting its leadership in the community. As one interviewee pointed out, *“If you target primarily people left behind by the economy, you have to have a much more intentional strategy regarding supporting and developing leadership and you can’t move as quickly. If you use volunteers with existing organizing and meeting skills, you can work yourself out of a job much more easily. Plus it’s a lot easier to incorporate emerging leaders if the work has started.”*
4. Another critical question is: What role might PRC play in facilitating the community process of making room for new leadership? A number of challenges were noted with respect to this, including:
  - “The people in the county who are leaders and who have power don’t want to give it up.”
  - “If leadership development means challenging the traditional political leaders, forget it. People who have tried to go against the political machine have been ‘wounded grievously.’”
  - *“We need to be able to identify and cede leadership to a whole new group of people.”*

At the same time, there was some optimism about the changes that some teams are already making:



- *At the beginning people didn't really see that the one of the main goals of the project is to create a solid base of leadership that can carry this work forward, but now there seems to be a better handle on this fact. They [the team members] are bringing on other types of people, people who have other perspectives and different ideas for how to shape this initiative.*
5. Finally, as PRC reaches its midpoint, teams are thinking about the future of their programs. How will teams use leadership development as a specific strategy to ensure the sustainability of the efforts they have begun through PRC?

**The Duke Endowment  
Program for the Rural Carolinas  
Participants**

The Duke Endowment Beneficiary	Program Name/Summary	Participating Years
<b>Option 1 Programs</b>		
Greenville District United Methodist Church	Beaufort County Program for the Rural Carolinas Beaufort County, NC  Affordable housing, IDAs <sup>1</sup> and an EITC <sup>2</sup> programs; small business development; and raising income levels through education and training.	2002-2006
Hinton Rural Life Center	Far West Mountain Economic Partners Cherokee, Clay, Graham & Swain Counties, NC  Heritage tourism, small-scale agriculture, and affordable housing.	2002-2006
Maria Parham Hospital	TEAM VANCE Vance County, NC  Reducing disparity between available jobs and unemployed people with skills. Identify key growth sectors. Affordable home-ownership. Connecting unemployed with jobs that have a career path towards a sustainable wage.	2002-2006
Marion County Medical Center	Marion County Collaborative Action Network Marion County, SC  Industry retention through improved productivity increasing employment, the expansion of existing and development of new sectors, and increasing income and wealth of the left-behind.	2002-2005
North Wilkesboro District United Methodist Church	Northwest Alliance Program for the Rural Carolinas Alleghany, Ashe & Wilkes Counties, NC  Leadership, marketing, program development, and entrepreneurial development.	2002-2006
Randolph Hospital	Randolph Program for the Rural Carolinas Randolph County, NC  Goals are directed at increasing employment and wealth.	2002-2006

<sup>1</sup> IDA is an individual development account for savings to purchase a first home, pursue job training or capitalize a small business.

<sup>2</sup> EITC is an earned individual tax credit that people of low wealth may use to reduce and individual's taxes. The reduction may be returned in the form of a refund.

The Duke Endowment Beneficiary	Program Name/Summary	Participating Years
Shady Grove United Methodist Church	Shady Grove Program for the Rural Carolinas (LO/UD) Lower Orangeburg & Upper Dorchester Counties, SC  Increasing the employment income, financial literacy, and wealth of people left-behind.	2002-2006
<b>Option 2 Programs</b>		
Allendale County Hospital	Helping Hands Allendale County, SC  Develop viable health care training programs and trustworthy communication links for the left-behind.	2002-2006
Calvary Memorial United Methodist Church	Contentnea Development Partnership Greene County, NC  Employment business development, wealth building through EITC and homeownership. Increasing public awareness of economic development issues.	2002-2005
Columbus County Hospital	Discover Columbus Columbus County, NC  Eco-tourism / Agri-tourism, Agri-business, and Leadership Development.	2002-2006
Duncan Memorial Untied Methodist Church	"Project Reach" <sup>2</sup> Georgetown, SC  Goals are to improve housing conditions while simultaneously providing job skill training for youth.	2002-2004
Hildebran United Methodist Church	East Burke Learning Alliance Burke County, NC  Involve existing business and industry in creating employment opportunities; increase the involvement of the left-behind and access to distant markets, people, and educational opportunities through public Internet sites.	2002-2006
Hot Springs Health Center	Madison PRC Madison County, NC  Increase the incomes of local farmers and craftsmen/artists and build the leadership and infrastructure that will sustain the increased income.	2002-2006
Hyde County Cooperative Parish (United Methodist Church)	Hyde County Program for the Rural Carolinas Hyde County, NC  Supporting development of the Hyde-Davis Business Enterprise Center; developing a plan for the Machapungo Park Project <sup>3</sup> ; and providing a framework for economic development, leadership training, and team building for the team.	2002-2005

<sup>3</sup> The Machapungo Park Project showcases the history and cultural heritage of Native American, European settlers and Civil War-era residents.

<b>The Duke Endowment Beneficiary</b>	<b>Program Name/Summary</b>	<b>Participating Years</b>
Isaiah United Methodist Church	<p style="text-align: center;">CAN Program/The Collaborative Colleton County, SC</p> <p>Increasing employment and wealth through IDA program.</p>	2002-2006
Onslow Memorial Hospital	<p style="text-align: center;">Onslow PRC Onslow County, NC</p> <p>Assessing the needs of the left-behind, improving their financial literacy, and building their wealth through the establishment of EITC and IDA programs.</p>	2002-2006
Pender Memorial Hospital	<p style="text-align: center;">Pender Rural Economic Development Task Pender County, NC</p> <p>Complete a comprehensive needs assessment showing key demographic and economic issues, and development of a plan for implementing the new ideas identified by these studies.</p>	2002-2006
Pilmoor United Methodist Church	<p style="text-align: center;">Steps-to-Success Camden &amp; Currituck Counties, NC</p> <p>Develop jobs, provide life skills training and mentor the left-behind. Create sustainable non-seasonal employment opportunities for coastal area citizens.</p>	2002-2005
Pinetop United Methodist Church	<p style="text-align: center;">Pinetops PRC Edgecombe County, NC</p> <p>Creating a new economic environment that provides new opportunities for employment and asset building through business development and growth.</p>	2002-2004
Roanoke Chowan Hospital	<p style="text-align: center;">Roanoke-Chowan PRC Bertie, Gates, Hertford &amp; Northampton Counties, NC</p> <p>Workforce development and increasing employment.</p>	2003-2005
Snow Hill United Methodist Church	<p style="text-align: center;">Stokes PRC Stokes County, NC</p> <p>Support local farmers and foster workforce development.</p>	2002-2006
The Rockingham District United Methodist Church	<p style="text-align: center;">The Robeson County Program for the Rural Carolinas Robeson County, NC</p> <p>Develop a countywide CDC to help team achieve wealth building through home ownership, small farm and agricultural development, small businesses, and create a plan for the long-term sustainability.</p>	2002-2005

**The Duke Endowment  
Program for the Rural Carolinas  
Working Memoranda Topics**

**Constituting Effective Teams for Rural Development in the PRC (November 2003)**

This memorandum reviews the rationale for the central role of collaborative teams in PRC's design and then examines the composition and structure of the newly constituted teams. Although teams differ considerably in their composition, most are relatively diverse by race and background but less so by class and age. The memorandum reviews the committee and governance structure each team has put in place to help it make decisions, allocate resources, and carry out the work. Even this early in PRC's implementation, about half of the teams are considering incorporating as a new nonprofit organization as a possible way to institutionalize the change process at the end of PRC. Teams also face the challenge of how to deploy staff effectively so that team members neither burn out nor reduce their much-needed engagement.

**Doing Development Differently: Innovation and Learning in the PRC (November 2003)**

The focus of this memorandum is on two challenges teams face as they translate new ideas about economic renewal into operational realities. First, how do they innovate without starting a large number of new programs that may neither maximize the use of existing community resources nor generate long-term support for sustainability? The memorandum describes how the teams are catalyzing innovation by creating and brokering partnerships and by strengthening the capacity of existing organizations to implement new programs. Second, how do teams build learning and evaluation into implementation in a way that enables them to reflect upon and refine their strategies as part of ongoing practice? Given implementation challenges, teams often have trouble finding the time to engage in iterative cycles of intentional learning, planning, doing, and evaluation that could improve their work.

**The Role of the Duke Endowment's Eligible Institutions in the PRC (November 2003)**

The rural Methodist churches and rural nonprofit hospitals that serve as team members and fiscal agents for PRC in each site face a number of challenges in PRC. They are expected to be leaders but not to be in charge, to produce results but to share that responsibility and credit with a range of other community partners, and to institutionalize the change process but not necessarily within their own structures. This memorandum examines what assets these churches and hospitals bring to PRC and how they have addressed the challenges inherent in their new roles. The potential for other rural churches and hospitals to develop increasing interest in playing leadership roles in promoting their community's economic renewal is also addressed.

**Managing and Implementing the PRC: The Role of Staff (May 2004)**

This memorandum reviews the role of staff in supporting the work of the PRC teams. It describes the central role of the project coordinator in facilitating, coordinating, and communicating; keeping team members engaged; and sustaining the pace and momentum of the work. What the coordinator and project staff actually do depends in part on what tasks the team members are willing and able to take on and what additional vehicles the team can create or

access for carrying out the work—such as using consultants, partnering with other organizations, or involving community members on PRC committees or task forces. The memorandum challenges teams to use staff and other vehicles to implement their agendas in ways that both produce program results and build enduring community capacity and support for a continuing partnership.

### **Leadership Development in the PRC (December 2004)**

This memorandum examines the different ways that teams have tried to identify and cultivate a cadre of people who are committed to working on behalf of PRC's goals. Potential leadership can come from PRC team members, as well as from diverse sectors of the community: ordinary citizens who express an interest in community improvement, traditional power brokers, people who work in organizations and agencies that serve the disadvantaged, and people left behind by the economy. All of these different kinds of citizens are necessary constituents of a long-term partnership to advance and sustain PRC's goals over time. But diverse strategies are needed to identify, engage, and develop these different leaders. The memorandum reviews both the formal and informal ways that the teams have fostered leadership and challenges teams to develop ways of monitoring the success of these efforts.

### **Public Sector Involvement in the PRC (December 2004)**

The focus of this memorandum is on the different ways in which the teams have approached the complexities of engaging the public sector, both elected officials and those who work for various government departments or offices at the municipal and county level. Clearly, teams cannot ignore the public sector and still access the resources and achieve the changes that are required for local economic renewal. But the timing and nature of the relationship involve strategic challenges, which teams have addressed in quite different ways with different results. The memorandum reviews the progress teams have made in garnering public support for their agendas, as well as for changing public sector policies to be more supportive of the interests of people left behind by the economy.

### **The Role of the Church in the PRC (May 2005)**

This memorandum examines the experience of the eleven Endowment-eligible rural United Methodist Churches or church-related entities that are participating in PRC. The focus is on the role church leaders and their UMC institutions have played in PRC and the impact of PRC on these institutions. Overall, the churches—like their rural hospital counterparts—have been successful intermediaries and effective fiscal agents. In turn, PRC has had a positive impact on their reputations in the community and their capacities as community partners. Few of the churches, however, have engaged their membership in PRC in a substantial way. The memorandum outlines why this has been the case and summarizes the emerging tools and strategies that UMC leadership is testing to get the laity involved in order to provide continuity and sustain the long-term commitment of the church to PRC's interests.

### **The Role of the Hospital in the PRC (September 2005)**

This memorandum examines the experience of the nine Endowment-eligible rural hospitals or health entities participating in PRC. The focus is on the role hospital executives and their institutions have played in PRC and the impact of PRC on these institutions. Overall, the rural hospitals—like their United Methodist Church counterparts—have been successful

intermediaries and effective fiscal agents. Despite increasing fiscal constraints, the hospitals have been able to draw upon their long history in the community, their stable leadership, and their close relationships to local business to help facilitate a broad community change agenda. As major employers, they have understood PRC's potential to address local workforce needs. A key question for these hospitals has been how much to engage their boards and embrace PRC as part of their core business. The memorandum ends with a strategic framework for leveraging health institution assets for community economic revitalization.

### **Managing and Supporting PRC (February 2006)**

This memorandum examines the management and provision of support to PRC with an eye toward drawing lessons for other foundations, intermediaries and nonprofits considering similar multi-year, multi-site initiatives. As PRC's intermediary, MDC provided a rich and diverse portfolio of supports, such as coaching, cross-site meetings, and access to a technical assistance pool, that were intended to convey information, inspire, challenge, facilitate and connect sites to additional resources. For the most part, these supports complemented the Endowment's unique relationship with its beneficiaries. Both MDC and the Endowment report that it would have been useful to develop additional clarity at PRC's inception regarding how success in PRC was to be defined, measured and reported. Further, both organizations would have benefited from more structured opportunities for mutual reflection and learning about how the ideas behind PRC were playing out in practice.