

Shannon Leadership Institute evaluation

3 year evaluation report (2007-09)

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Background

Shannon Leadership Institute overview

The goal of the James P. Shannon Leadership Institute, a program of the Amherst H. Wilder Foundation, is to ensure a sustainable cadre of renewed, experienced, and effective leaders who are committed to service in the nonprofit sector.

The Shannon Institute offers a structured, challenging and supportive opportunity for personal and professional renewal for experienced leaders of philanthropic, civic and community service organizations. Institute participants must apply for selection and incur monetary and time commitment costs. They attend for one year, meeting monthly or quarterly for retreats and renewal experiences. Shannon Institute experiences are designed to help participants:

- Clarify the purpose of their work and the core values they want that work to exemplify;
- Identify strategies to increase their effectiveness; and
- Articulate changes needed to enhance focus, commitment, energy and satisfaction.

Evaluation overview

Wilder Research prepared this 3-year evaluation report using self-assessments completed by Shannon Leadership Institute participants during 2007, 2008, and 2009. Using a self-assessment form developed by Shannon Institute staff, participants rated themselves at the start at the program, then again at the end of the program. Ratings at the end of the program included both a retrospective and current rating.

This evaluation describes to what extent Shannon Leadership Institute participants report: 1) they gain knowledge of themselves, clarity of values, and connection with others, and 2) their perceptions of increased effectiveness as a result. It also compares results for participants attending monthly sessions with those attending quarterly, and compares evaluation results by year.

Summary of findings

Participants in the Shannon Leadership Institute report sizable gains during the program. Participants seem to grow most in areas where they initially lack knowledge and abilities. They grew in the following ways (from largest to smallest): knowledge of self, commitment to service, perceived effectiveness, and connection to others. Participants describe the program as enabling them to gain greater self-awareness and clarity about their values, enabling them to be more effective leaders. In their own words, participants describe the increased balance they have achieved in their life, and the meaningful connections they have made. Growth in those areas aligns with the Shannon Leadership Institute's expectations and can be attributed to the program's emphasis on strengthening leadership assets. Open-ended comments suggest that the benefits also align with participants' expectations.

Some self-rated items measure participants' perceived impact on organizations and communities. Participants expressed large gains in response to those questions (i.e., about fulfilling, productive, and effective work) and offered some comments regarding external impact. However, because the self-assessment form does not directly assess organizational and community impact, the extent of such impact remains unspecified.

Comparisons across the three years reveal each cohort experienced similar levels of growth on most items. The 2009 cohort had the least growth, on average, in a few areas, largely because this cohort started out higher.

Results for monthly and quarterly participants are similar, with no significant difference between the two groups on most items, indicating Shannon Leadership Institute participants experience similar growth regardless of the frequency of meetings. [Note: quarterly participants meet less frequently, but have a comparable number of meeting hours as monthly participants.] Across the three years, the only item which monthly participants had a marginally greater growth was: "I am clear about the values that drive my work."

Evaluation findings

Group results of participants' self-ratings

This section describes hindsight (retrospective) self-ratings of knowledge and abilities before the program compared with post-program self-ratings for the participants as a whole. [Note: the next section reports results by each individual's growth.]

Participants often overestimate their knowledge and abilities on pretests, which measure their self-ratings at the time they enter the program. Based on a comparison of the pretests (self-assessments done at the beginning of the program) and retrospective pretests (pre-program self-assessments done in retrospect at the end of the program), participants either realized they were not as well off as they initially thought or they were less able to provide a reliable self-rating before the program, which may indicate that participants gained self awareness during the program. Instead, results from the retrospective pretests are presented here. More detail is discussed in the Methods section.

Group results from the self-assessments for participants from all 3 years are shown in Figure 1 below. As a whole, Shannon Leadership Institute participants rated themselves highly on nearly every item assessed after experiencing the program. Additionally, more participants rated themselves highly after the program than before, suggesting gains in knowledge and abilities as a result of the Shannon Institute. However, some individual participants did not experience positive gains, which will be discussed in the next section.

When asked, "Where do you think you are now on a continuum of renewal however you define it?" about 85 percent of participants rated themselves highly (ratings of 4-5) after the Shannon Leadership Institute. Retrospectively, few participants (5%) rated themselves highly, 27 percent rated in the middle, and most (67%) exhibited either low or no renewal. In other words, out of 20 participants per group, 16 people reported gaining a sense of renewal during their time in the program.

After the program, 93 percent agreed or strongly agreed with the statement: "I know what I need to maintain a healthy balance between work and my personal life." However, after the program, only half (56%) agreed or strongly agreed with the statement: "I regularly do what it takes to maintain a healthy balance between work and my personal life." This difference indicates that though most participants know what to do to maintain a healthy work-life balance, many are still figuring out how to regularly do so.

Overall, Shannon participants reported the most change during the program in those areas which they retrospectively rated themselves lower. The largest shift occurred in response

to participants' self-assessment of where they are on a continuum of renewal (discussed above). The second largest shift occurred in response to "I can easily state my priorities for the future," from 14 percent who agreed or strongly agreed before to 89 percent after, followed by "I am clear about the values that drive my work" (35% before to 98% after) and "I know what I need to maintain a healthy balance between work and my personal life" (42% before to 93% after). These results suggest that the program assists participants in stating their future priorities, defining the values that drive their work, and learning how to maintain a healthy work-life balance.

Areas in which participants' retrospectively rated themselves higher changed less. The smallest shifts occurred in response to "service to community beyond my paid work is very important," (74% agreed or strongly agreed before, compared with 92% after) and "I am effective within my chosen field" (76% before to 94% after). Clarity about values driving one's organization, and participants' fulfillment with their work were areas in which participants had room (less than 55% agreed or strongly agreed before) to grow, but did not shift very far as a group (less than 80% agreed or strongly agreed after).

1. Self-ratings before and after Shannon Institute for participants as a whole

	Before (retrospective)	After
Where do you think you are now on a continuum of renewal however you define it?	N=140	N=141
5 - Renewed	1%	20%
4	4%	65%
3	27%	14%
2	41%	1%
1 - Not renewed	26%	0%
I have a clear understanding of the purpose of my work.	N=1512	N=155
Strongly agree	15%	47%
Agree	35%	48%
Neutral	30%	4%
Disagree	18%	1%
Strongly disagree	3%	0%
I am clear about the values that drive my work.	N=153	N=157
Strongly agree	9%	66%
Agree	26%	32%
Neutral	33%	2%
Disagree	31%	0%
Strongly disagree	3%	0%

1. Self-ratings before and after Shannon Institute for participants as a whole (continued)

	Before (retrospective)	After
I am clear about the values that drive the work of my organization.	N=154	N=147
Strongly agree	16%	37%
Agree	20%	40%
Neutral	34%	18%
Disagree	12%	3%
Strongly disagree	7%	<1%
I am self aware.	N=153	N=156
Strongly agree	10%	51%
Agree	46%	47%
Neutral	31%	3%
Disagree	11%	0%
Strongly disagree	2%	0%
I have meaningful connections to others.	N=155	N=155
Strongly agree	19%	53%
Agree	43%	41%
Neutral	24%	5%
Disagree	12%	<1%
Strongly disagree	<1%	<1%
Service to community beyond my paid work is very important.	N=155	N=156
Strongly agree	35%	62%
Agree	39%	30%
Neutral	20%	8%
Disagree	6%	<1%
Strongly disagree	0%	0%
I have the ability to 'get back on track' after periods of high stress.	N=152	N=157
Strongly agree	10%	34%
Agree	30%	54%
Neutral	28%	10%
Disagree	30%	1%
Strongly disagree	10%	0%

1. Self-ratings before and after Shannon Institute for participants as a whole (continued)

	Before (retrospective)	After
I find my work to be fulfilling.	N=153	N=156
Strongly agree	15%	43%
Agree	38%	44%
Neutral	24%	10%
Disagree	17%	4%
Strongly disagree	7%	<1%
I know what I need to maintain a healthy balance between work and my personal life.	N=155	N=155
Strongly agree	14%	51%
Agree	28%	42%
Neutral	27%	6%
Disagree	24%	1%
Strongly disagree	8%	0%
I regularly do what it takes to maintain a healthy balance between work and my personal life.	N=154	N=155
Strongly agree	3%	13%
Agree	12%	43%
Neutral	29%	31%
Disagree	42%	12%
Strongly disagree	15%	<1%
I feel confident enough to take risks.	N=154	N=157
Strongly agree	7%	41%
Agree	38%	48%
Neutral	31%	8%
Disagree	21%	2%
Strongly disagree	3%	2%
I can easily state my priorities for the future.	N=153	N=155
Strongly agree	3%	46%
Agree	11%	43%
Neutral	35%	10%
Disagree	44%	<1%
Strongly disagree	7%	0%

1. Self-ratings before and after Shannon Institute for participants as a whole (continued)

	Before (retrospective)	After
I am productive at work.	N=155	N=156
Strongly agree	16%	40%
Agree	46%	49%
Neutral	24%	10%
Disagree	12%	<1%
Strongly disagree	3%	0%
I am effective within my chosen field.	N=155	N=157
Strongly agree	23%	56%
Agree	53%	38%
Neutral	22%	6%
Disagree	3%	0%
Strongly disagree	0%	0%
I understand the impact my work has in my community.	N=154	N=157
Strongly agree	22%	59%
Agree	46%	35%
Neutral	25%	6%
Disagree	7%	0%
Strongly disagree	0%	0%

Perceived individual gains in knowledge and abilities

The previous section examined how the participants shifted as a whole group from lower to higher self-ratings. This section thematically examines individual gains in knowledge and abilities and how participants describe those gains. As discussed in detail in the Methods section of this report, individual growth represents the difference between how participants viewed themselves before the program and how they viewed themselves after the program. Change in self-ratings before and after the program could range from negative 100 percent (loss) to positive 100 percent (gain).

Ranking individual growth scores for each item on the self-assessment shows that participants, on average, experienced the largest individual gains in terms of renewal (47% gain on average), and followed by ease of stating future priorities (44% gain). Participants experienced the smallest gains in the areas of service to community beyond paid work

(12% gain) and being effective within their chosen field (13% gain). The smaller gains may reflect the program's model whereby participants gain greater renewal and clarity by being more selective and strategic in how they spend their time. The two self-assessment questions that come closest to assessing the impact of Shannon Leadership Institute in the larger community beyond participants also indicate relatively small growth: effectiveness in chosen field (13% gain) and productivity at work (17% gain).

In their own words, participants describe gaining greater self-awareness and clarity about their purpose, and increased balance in their life. They reported making career changes to better align with their core values, and becoming stronger leaders to more effectively impact change in their communities. Finally, they expressed an increased connection with family, and colleagues.

Themes

Based on a statistical analysis of the growth scores, the self-assessment items were grouped into four themes. Three of the themes align with the three assets of effective leaders promoted by the Shannon Leadership Institute: knowledge of self, commitment to service, and connection to others. A fourth theme, "perceived effectiveness," reflects the participants' perceived impact in their organizations and communities. Themes are sorted below from largest to smallest gains.

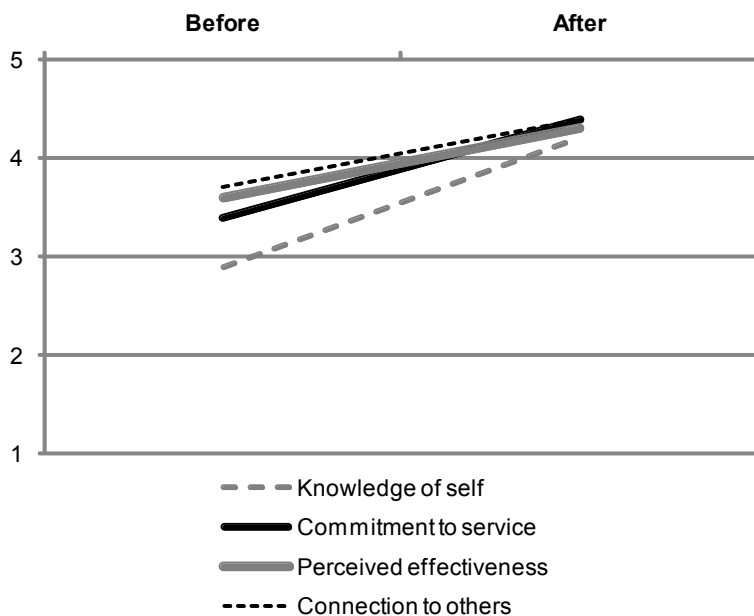
As shown in Figures 2 through 7, participants grew the most in the areas where they had the most room to grow (i.e., where they initially rated themselves low). For example, participants initially rated their self-knowledge lowest. After the program, those ratings were similar to the other themes, but participants gained more in self knowledge than in any other area.

2. Summary of average self-ratings by theme

	Before (N=155)	After (N=155)	Growth (N=155)
Knowledge of self	2.9	4.2	33%
Commitment to service	3.4	4.4	25%
Perceived effectiveness	3.6	4.3	17%
Connection to others	3.7	4.4	16%

Note: Before and after self-ratings range from 1 (strongly disagree) to 5 (strongly agree). Growth represents change in self-ratings as a percentage of 4 possible points, ranging from negative 100 percent (largest loss/negative growth) to positive 100 percent (highest possible growth).

3. Average self-ratings by theme



Theme: Knowledge of self

Knowledge of self is a prerequisite to achievement in one's organization and community. Relevant comments suggest the Shannon Leadership Institute can clear the way for participants to become clearer about their own priorities, values, and future goals; gain confidence; and acquire skills to balance workloads and deal with stress.

I'm more self aware, more willing to take a risk, question my actions and understand my values, able to identify my strengths and weaknesses.

It has really brought a new level of clarity into my life which will hopefully exemplify itself in more intentionality.

I am not afraid to talk out loud about changes I need to make in my life. I hope I will have the courage to make some of these changes.

I have tools to deal with stress and crisis – effective tools and a commitment to a new life plan.

I am much more reflective, really on target in terms of identify the underlying causes of my behaviors, reactions, thoughts, etc. I have a clear and doable plan of how to continue my growth process and I have already put some actions in place and am engaged in them.

Greater clarity/centeredness for future action for refining my goals – no doubt it will have a direct impact on my work, it will benefit from having balance.

It has given me confidence, renewed my faith, and infused me with optimism.

I expect it will help me take more risks to bring benefits to my community and will deepen my ability to grow and change as conditions warrant.

Enabled to get outside of myself, have more perspective about why I do or used to do certain things. Think about what a holistic life and full array of values could be.

I have developed a different kind of confidence in my daily life. It's allowed me to be bolder but also to step back from situations that need patience and thinking through.

Another chapter in life long learning where I see clear deepening in self-awareness and pieces continue to be understood in new light.

Giving me more clarity and balance in both my professional and personal life. Clearer goals on what I still have to accomplish with my life.

Participants retrospectively rated themselves lowest in self knowledge when entering the Shannon Leadership Institute. However, by the time their program year ended, they had gained the most in this area, as measured by an increase of 33 percent, on average. Participants rated themselves as achieving a 47 percent gain on average when asked "Where do you think you are now on a continuum of renewal however you define it?" followed closely by 44 percent in response to "I can easily state my priorities for the future." Other gains range from 32 percent on average for "I know what I need to maintain a healthy balance between work and my personal life" to 25 percent for being self aware.

Looking at the range of individual changes in this area, rather than average changes, reveals a individuals range from a maximum improvement of 100 percent to a loss of negative 50 percent. The latter can be attributed to one participant's decline in work/life balance. Overall, the individual responses to the questions: "I regularly do what it takes to maintain a healthy balance between work and my personal life," and "I know what I need to maintain a healthy balance between work and y personal life" vary the most.

4. Self-ratings of growth: Knowledge of self

	Average growth (N=132-154)
Where do you think you are now on a continuum of renewal however you define it?	47%
I can easily state my priorities for the future.	44%
I know what I need to maintain a healthy balance between work and my personal life.	32%
I have the ability to 'get back on track' after periods of high stress.	27%
I regularly do what it takes to maintain a healthy balance between work and my personal life.	27%
I feel confident enough to take risks.	26%
I am self aware.	25%

Theme: Commitment to service

Comments reveal that the Shannon Institute can help participants define their core values to better serve their organization and communities:

The values clarification was so helpful to me and really has helped shape how I want to be engaged in community service.

The Shannon experience has given me the clarity, courage, and most important, the faith to live my life according to my core values. It's changed my life in amazing, unexpected and powerful ways.

I am pushing forward to ensure that my career is congruent with my core values.

I expect that I will have a more meaningful impact in my family life, work, and community. I expect to enjoy my life even more so that I have more to give.

My role in community is clearer – I've taken things off my plate, and have increased my attention to those remaining on my plate.

I believe I can be more effective in my future work having spent this time to reflect and examine my core values and methods of renewal.

I have much clearer priorities, goals, and strategies for renewal and exploring future career options. Will help me keep health (physical, mental, emotional) as a top priority and family.

Some participants described career changes they planned to make as a result of accessing their core values.

The organization will be prepared gracefully through a process of succession planning. I predict a readiness from me, rather than a wrenching apart.

I will leave my current position sooner than later and confidently.

The renewal process has helped to prepare my transition during retirement.

I may not want to continue to do paid work but rather to use my talents in other ways.

I've made a significant decision about my job. I have begun to move purposefully towards my work transition. My attitude – now a positive feeling that I can do this.

Better alignment between my values and the focus of my work in the community. Either change or modification in my current role including transition to a new organization.

Facilitated making my decision to retire from state service and face the next adventure.

The second largest gains occurred in commitment to service (25% on average). Participants exhibited growth of 40 percent for clarity about values driving their work, followed by 26 percent for clarity of understanding the purpose of their work and 18 percent for understanding the impact of their work in their community. The of individual changes in this area also range from a maximum improvement of 100 percent to a loss of negative 50 percent, with the responses to the question "I have a clear understanding of the purpose of my work" having the most variability across individuals.

5. Self-ratings of growth: Commitment to service

	Average growth (N=132-154)
I am clear about the values that drive my work.	40%
I have a clear understanding of the purpose of my work.	26%
I understand the impact my work has in my community.	18%

Theme: Perceived effectiveness

Some participants describe achieved and anticipated gains in their leadership abilities and other impacts they will have on their organizations and communities:

I expect to make significant impact as an E. D. of a non-profit in the future and as a dedicated, honorable father and husband.

Visible, powerful, focused, effective leader moving in ever expanding circles of influence and inviting many others to step into the leadership journey from all walks of life, backgrounds and ages.

Integrating Shannon principles into my management style. Able to manage challenges and change as process, not crisis.

[I am] assuming leadership positions I had not thought I would.

I expect to bring renewed leadership, new techniques, and tools to my work – giving my coworkers more opportunity to share and participate in cooperative problem solving and idea generation.

I have already seen big changes in my leadership and I have been the better for it. I have started to apply my lessons and I can feel the increased energy and power in my life.

I will be able to have an impact on a greater cross section of society. This has made me aware of the courage I have and the need to take risks to make ever greater contributions.

Provided me with the necessary structure to plan to make changes leading to a more focused path. Ability to assess my current situation and identify steps needed to make progress on goals. Helped me move through the most challenging time in my professional career.

I have defined the major obstacles present and developed effective strategies to effect renewal. To date there is a marked difference in outcome.

Questions reflecting perceived effectiveness rank third among the themes (17% average growth). Among the themes, this one comes closest to measuring participants' perceived impact beyond in organizations and communities. Participants experienced the largest gain in finding their work fulfilling (23%), followed by productivity at work (17%) and effectiveness in their chosen field (13%). Less change was seen in this area because participants felt they were stronger in these areas initially.

6. Self-ratings of growth: Perceived effectiveness

	Average growth (N=132-154)
I find my work to be fulfilling.	23%
I am productive at work.	17%
I am effective within my chosen field.	13%

Theme: Connection to others

The fourth theme represents meaningful connections to one's organizational mission, to others, and to one's community. Comments indicate that Shannon Institute made meaningful personal and professional connections with others, as well as stronger organizational partnerships, and a clearer sense of what they can offer others:

I have a new sense of confidence that is authentic and which I want to use to bring my best gifts to my friends, family and community. I also have a deeper love and respect for the gifts of others and want to continue to grow this.

I believe that some of the connections to people will endure beyond this year and will continue to be a source for personal growth, support and renewal.

I have begun to take more seriously the mentoring and support I can offer younger leaders.

A new circle of friends, peers with whom to evaluate our progress at becoming more thoughtful, courageous, intellectual leaders in this new age of change.

Helped me to be more focused, attentive to others, and sensitive to other people's needs and opinions.

I have immersed myself in sound design. I have taken steps to form the partnerships for the more ambitious and imaginative enterprises I envision that play to my strengths. On the other hand, I have taken steps to be practical and tough in light of the upcoming financial situation.

Strong friendships that lead to innovative social change.

If I stick to my plan and stay in touch with my Shannon cohort, a positive difference with self, family, others, community.

Reminded me that much can be learned from listening to others. Reminded me that I am not alone in the struggle.

Participants entered and exited the Shannon Institute with highly developed connections. This is reflected in relatively low average growth of 16 percent. The largest growth in this area occurred in meaningful connections to others (19%), followed by clarity about values driving their organization (17%), and perceived importance of service to community beyond paid work (12%).

7. Self-ratings of growth: Connection to others

	Average growth (N=132-154)
I have meaningful connections to others.	19%
I am clear about the values that drive the work of my organization.	17%
Service to community beyond my paid work is very important.	12%

Organizational and community benefits

The self-assessment questions reflect Shannon Leadership Institute's emphasis on three assets of effective leaders: knowledge of self, connection to others, and commitment to service. This evaluation focuses on how participants' assess their own personal growth. The program's underlying theory of change is that by building those leadership assets and sustaining the overall level in the nonprofit sector, participants' organizations and communities will benefit. When participants' gain clarity on their own values, they can commit to those causes they care most deeply about; thus having greater impact on the community.

As mentioned earlier, the theme "perceived effectiveness" measures participants' perceived impact on organizations and communities. Participants expressed large gains in response to questions on perceived effectiveness (i.e., about fulfilling, productive, and effective work), lending support to the Shannon Leadership Institute's underlying theory of change.

Open-ended comments reveal some anticipated impact on organizations and communities, but those changes are eclipsed by expressions of individual empowerment during the program, probably reflecting the wording of the open-ended questions (see Methods section).

Comparison of monthly and quarterly participants

The Shannon Leadership Institute offers a monthly or quarterly option. Though contact hours over the course of the year are equivalent, the frequency of meetings varies. Monthly participants are drawn from the Twin Cities metro area, whereas the quarterly program draws leaders from nationwide. Monthly and quarterly participants grew at similar rates during the program (see Figure 8); though monthly participants experienced a slightly greater gain in one area: “I am clear about the values that drive my work.”

8. Growth scores: Comparison of monthly and quarterly participants

	Monthly (N=41-47)	Quarterly (N=91-106)	Monthly- quarterly difference (132-153)
Where do you think you are now on a continuum of renewal however you define it?	46%	48%	-2%
I can easily state my priorities for the future.	44%	44%	0%
I am clear about the values that drive my work.	46%	37%	9%*
I know what I need to maintain a healthy balance between work and my personal life.	32%	33%	-1%
I regularly do what it takes to maintain a healthy balance between work and my personal life.	29%	27%	2%
I feel confident enough to take risks.	26%	26%	0%
I have the ability to 'get back on track' after periods of high stress.	24%	28%	-4%
I am self aware.	23%	25%	-2%
I have a clear understanding of the purpose of my work.	22%	27%	-5%
I have meaningful connections to others.	22%	17%	5%
I find my work to be fulfilling.	21%	23%	-2%
I am productive at work.	17%	16%	1%
I am clear about the values that drive the work of my organization.	15%	18%	-3%
Service to community beyond my paid work is very important.	14%	11%	3%
I understand the impact my work has in my community.	14%	19%	-5%
I am effective within my chosen field.	13%	13%	0%

Note: Items marked ** indicate a statistically significant difference at the 95% confidence level; * indicates a marginally significant difference at the 90% confidence level. *Results are rounded.*

Comparison of evaluation results by year

The 2007, 2008, and 2009 Shannon Leadership programs produced similar evaluation results. All three groups showed stronger self-ratings of their knowledge and abilities after the program than on their hindsight (retrospective) self-ratings of their knowledge and abilities before the program. All three groups showed large shifts in their placement on the continuum of renewal and their agreement with the statements: “I am clear about the values that drive my work,” and “I can easily state my priorities for the future.” In addition, all groups had little change in agreement with the statements: “Service to community beyond my paid work is very important,” and “I am effective within my chosen field.”

The 2008 cohort saw the largest growth in the area of self and connection to others; whereas the 2009 cohort had the least growth in the area of commitment to service and perceived effectiveness, though this cohort started out higher, on average, in both areas.

The only item in which there was a statistically significant difference between years was “I know what I need to maintain a healthy balance between work and my personal life,” indicating participants across years experienced similar growth in almost all areas.

9. Growth scores: Comparison of participants by year

	2007 (N=34-50)	2008 (N=45-63)	2009 (N=45-49)	Total (N=132-154)
Knowledge of self	31%	35%	31%	32%
Where do you think you are now on a continuum of renewal however you define it?	45%	51%	46%	47%
I can easily state my priorities for the future.	42%	47%	43%	44%
I know what I need to maintain a healthy balance between work and my personal life.	31%	40%	26%	32%**
I have the ability to 'get back on track' after periods of high stress.	29%	30%	21%	27%*
I regularly do what it takes to maintain a healthy balance between work and my personal life.	23%	27%	32%	27%
I feel confident enough to take risks.	25%	23%	30%	26%
I am self aware.	25%	26%	21%	25%
Commitment to service	26%	27%	22%	25%
I am clear about the values that drive my work.	41%	43%	35%	40%
I have a clear understanding of the purpose of my work.	28%	30%	19%	26%*
I understand the impact my work has in my community.	20%	17%	16%	18%
Perceived effectiveness	20%	19%	13%	17%
I find my work to be fulfilling.	28%	22%	17%	23%
I am productive at work.	17%	19%	13%	17%
I am effective within my chosen field.	14%	16%	10%	13%
Connection to others	15%	18%	15%	16%
I have meaningful connections to others.	16%	23%	17%	19%
I am clear about the values that drive the work of my organization.	18%	19%	14%	17%
Service to community beyond my paid work is very important.	12%	10%	14%	12%

Note: Items marked ** indicate a statistically significant difference at the 95% confidence level; * indicates a marginally significant difference at the 90% confidence level. *Results are rounded.*

Methods

Self assessment overview

Shannon Leadership Institute administers a self-assessment to participants. It asks participants to rate themselves along a 5-point scale in response to 16 questions. Additionally, participants are asked to respond to two open-ended questions in their own words regarding changes they experienced.

Managers and funders often want to know if program participants gain knowledge and abilities as a direct result of programs like the Shannon Leadership Institute. Determining growth in knowledge and abilities requires assessing participants before the program and afterwards. Subtracting pre-program attribute levels from post-program levels reveals the amount of change (i.e., growth scores).

Accordingly, the Shannon Leadership Institute administered its self assessment twice to participants, once before the program and again at the end of the program year. One portion of the end-of-year self assessment asks participants for post-program self-ratings; while another portion asks them think back and rate themselves before the program (i.e., in hindsight). Self-assessment response rates are shown in Figure 10.

10. Self-assessment response rates

	Percentage of all respondents (N=184)
Pre-program self-assessment	96%
Retrospective pre-program self-assessment	84%
Post-program self-assessment	86%

Using two self-assessments has been shown to underestimate the amount of growth experienced by program participants.¹ Those who are unfamiliar with topics presented during the program tend to overestimate their levels beforehand, scoring themselves lower *after* gaining knowledge and abilities. This inaccuracy is called response shift bias.

¹ Pratt, C. C., McGuigan, W. M., and Katzev, A. R. (2000). Measuring program outcomes: Using retrospective pretest methodology. *American Journal of Evaluation*, 21(3), 341.

Response shift bias may be remedied by conducting just one self assessment after the program, as the Shannon Institute did with participants. Thinking back and reporting pre-program levels is called a retrospective pre-test. In addition to avoiding response shift bias, a retrospective pretest-posttest self assessment is advantageous because it reduces the burden of administering a second self-assessment.

Growth scores from the two different types of self-assessments are compared in Figure 11 below. Results from the two-self assessment approach suggest that participants consistently experienced negative outcomes from the program, contrary to open-ended comments expressing benefits. This indicates that participants probably overestimated their attributes on the pre-program self-assessment. Growth scores calculated from the retrospective pretest-posttest self-assessment suggest positive outcomes, consistent with open-ended comments. Accordingly, this evaluation focuses on responses to the retrospective pretest-posttest.

Two open-ended questions ask participants to describe changes they experienced: "What difference has this year's program made for you already?" and "What difference do you expect it to make in the future?" The first question elicits information about short-term changes in the participant. The latter question asks about future changes, leaving it up to the respondent to specify whether anticipated changes will be personal, organizational, or in the community. However, the sequence of the two questions implies a request for future changes of a personal nature, consistent with the previous question. Consequently, most of the future changes were expressed in personal terms, rather than organizational or communal terms.

Growth scores

Growth scores were calculated to measure the extent to which Shannon Leadership Institute participants gained knowledge and abilities. Scores were calculated by converting responses to numbers (e.g., from strongly agree = 5 to strongly disagree = 1) and subtracting the post-program rating from the pre-program (retrospective) rating for each self-assessment question. Additionally, post-pre differences were divided by the total possible change in points (i.e., 4 points). For example, if a respondent agreed that they felt confident enough to take risks after the program and disagreed before the program, then their growth score was calculated as $(4 - 2) / 4 = 50$ percent. Calculating growth scores in this manner yields a scale from negative 100 percent to positive 100 percent. If a respondent did not have both a before and after rating, a growth score could not be calculated.

11. Growth scores: Two self-assessments (one before and one after) versus one self-assessment (retrospective pre-post)

	Mean growth score for two self-assessments (N=123-151)	Mean growth score for one self-assessment (N=132-154)
Where do you think you are now on a continuum of renewal however you define it?	39%	47%
I have a clear understanding of the purpose of my work.	17%	26%
I am clear about the values that drive my work.	22%	40%
I am clear about the values that drive the work of my organization.	9%	17%
I am self aware.	17%	25%
I have meaningful connections to others.	8%	19%
Service to community beyond my paid work is very important.	10%	12%
I have the ability to 'get back on track' after periods of high stress.	17%	27%
I find my work to be fulfilling.	14%	23%
I know what I need to maintain a healthy balance between work and my personal life.	28%	32%
I regularly do what it takes to maintain a healthy balance between work and my personal life.	23%	27%
I feel confident enough to take risks.	16%	26%
I can easily state my priorities for the future.	41%	44%
I am productive at work.	12%	17%
I am effective within my chosen field.	11%	13%
I understand the impact my work has in my community.	15%	18%

Note: Growth scores fall on a scale from -100% (loss) to 100% (gain).