



**Moderator:** Anat Gerstein, President, Anat Gerstein, Inc

**Panelists:** Meredith Barber, Senior Director of Institutional Advancement, Leake & Watts  
Michelle Pullaro, Chief Administrative Officer, Per Scholas

**Agenda**

10:00 AM – 10:05 AM	Welcome
10:05 AM – 10:25 AM	Moderator and Panelist Remarks
10:25 AM – 11:20 AM	Panel Discussion and Useful Tools & Resources
11:20 AM – 11:50 AM	Q & A
11:50 AM – 12:00 PM	Closing Remarks

**Table of Contents**

- Organizational Profiles of Panelists..... 2-4
- Tips & Strategies from Workshop Panelists..... 5
- Nonprofit Excellence Awards: List of Past Winners .....6
- Resources:
  - Leake & Watts Team Meeting Format... ..7
  - Leake & Watts Mission Effectiveness .....8
  - Per Scholas: Tools and Templates, Internal and External.....10-15
- Notes Page.....16

*The Pathways to Excellence workshop series is an outgrowth of The New York Community Trust Nonprofit Excellence Awards Program, managed by the Nonprofit Coordinating Committee of New York in collaboration with The Trust and Philanthropy New York with media sponsor WNYC.*

## ORGANIZATIONAL PROFILE

### **Leake & Watts**

#### ***2014 Gold Prize Winner for Overall Management Excellence***

Founded as an orphanage in 1831, Leake & Watts continues to provide support today to over 11,000 children, adults and families each day so they can achieve success tomorrow. Through 43 programs at 27 sites, Leake & Watts provides dedicated support to facilitate safe environments for children and help families thrive through family stabilization, family foster care and adoption programs; innovative educational programs that advance learning from early childhood through high school; result-focused programs that help youth involved in the juvenile justice system change the trajectory of their lives; caring services that promote independence for children and adults with developmental disabilities; and pro-active community health initiatives that foster physical, mental, and emotional well-being.



Dedicated to ensuring all receive the support they need, Leake & Watts is committed to innovation and continually adapting and updating its programs to meet the changing needs of the communities it supports as well individualizing supports to provide a truly person-centered approach to service delivery. A robust set of management practices, including establishing an agency-wide culture focused on results and building systems that leadership could turn to for data, help guide the organization. For example, after several years of development, they launched the PROMISE model, a unique agency-wide approach to service that builds on proven results, promotes best and innovative practices, and ensures the highest quality of service. Through PROMISE, they assure that the person receiving services is at the center of its work, understand the impact of trauma and are recognizing and encouraging the growth of strengths and positive behaviors in all programs. Further, Leake & Watts developed and employed a set of 39 separate Performance Effectiveness Indicators (PEIs) for measuring outcomes that go far beyond those prescribed by funders or required by government contracts. This extensive, interlocking system of PEIs helps measure and understand the full impact of the organization's work in every program and across the agency as a whole.

A strong collaboration among the Board of Directors, Executive Director, and staff continually involves being transparent about what they do and holding people accountable. Leake & Watts' Board and leadership understand that they must continually work to improve their service delivery and infrastructure to meet the ever-changing needs of the communities they support. Their strategic plan was developed with this in mind and ensures that management's focus is on mission-related and organizational results. Leake & Watts hired a Chief Strategy Officer (CSO) to lead its efforts in achieving the goals of the strategic plan. With the support of the CSO, all staff remains actively involved in the implementation of the strategic plan and achievement of its goals.

Leake & Watts incorporates many evidence-based models into its service delivery and is piloting several new models in collaboration with developers in several service areas as well. Further, Leake & Watts's rigorous Quality Assurance (QA) procedures involve the QA Department at all levels to ensure that programs remain mission-focused and that outcomes are consistently measured. A Risk Management Committee continually examines trends in the industry to ensure that the organization is addressing all potential challenges that have the necessary procedures and protocols in place.

#### **Examples of Excellence Identified by the 2014 Selection Committee:**

- Annual communications plan created by Institutional Advancement Committee and approved by the Board
- Plan directly tied to programmatic and development efforts
- Plan ensures consistent messaging and branding in multiple communications channels
- Expertise in crisis communications; focus on transparency
- Assess and prioritize community needs through two-way communications
- Parent Committees provide feedback

- Revamped internal website (intranet) to be a resource for staff, including relevant forms and a calendar of events
- Keep staff informed via agency-wide Quarterly Employee Newsletter

## ORGANIZATIONAL PROFILE

### Per Scholas

**2016 Bronze Prize Winner for Management Excellence**



Per Scholas is a national nonprofit that drives positive and proven social change in communities across the country. Through rigorous and tuition-free technology training and professional development, we prepare motivated and curious adults who are unemployed or underemployed for successful careers as IT professionals, and we create onramps to businesses in need of their talents. Today we provide our solutions in six cities across the country: Atlanta, GA; Greater Cincinnati, OH; Columbus, OH; Dallas, TX; the National Capital Region; and New York. To date, Per Scholas has trained over 6,500 individuals, helping them build lasting, life changing skills and careers in technology.

**OUR VISION:** We envision a future where individuals from any community can access well-paying career positions, and where talent is recognized and recruited from many diverse sources.

**OUR MISSION:** Opening doors to technology careers for individuals from often overlooked communities.

### OUR VALUES

- We are a data-driven, results-oriented and forward-looking catalyst for social change.
- We value agility and innovation in order to create deep and lasting impact in the communities in which we work.
- We are committed to fostering an equitable, diverse and inclusive tech sector.
- We value individuals with curiosity, integrity and a drive for personal and professional improvement.
- We value professionalism, diligence and a respect for all people.

**OUR IMPACT:** Since 1995, we have helped to open doors for more than 6,500 individuals, helping them build successful careers in technology and spurring economic development in their communities. Our model has been replicated and proven to work in multiple cities across the country. Independent, third party data proves that we are making positive and potentially life-long change happen in communities across the country. These are early and remarkable signs of what's possible with Per Scholas.

- 85% of our students graduate.
- 80% of graduates land jobs.
- After one year of employment, our students experience a wage increase of 15 percent, and sometimes more.
- 75% of graduates retain employment for at least one year.
- 90% of our students are people of color, a third are women and a third are young adults who are jobless or underemployed.

Programs are aligned with three areas:

Creating Opportunity,  
Closing the Skills Divide  
Achieving Diversity

**Examples of Excellence Identified by the 2016 Selection Committee:**

- In touch with constituents' needs and restructured organization to deliver maximum service
- Ensure communications across platforms are coordinated, aligned with and in support of business strategy
- Use Student Ambassadors Program as way to identify strong examples of success, aligned with mission and goals; then use social media to amplify message on different platforms
- Stories and messaging reflect the impact the organization wants
- Board members and all staff receive message training to effectively and accurately reflect current message and values
- Strategic communications plan includes a Brand Book that goes beyond visual representation and is used to build capacity; focus is on language and messaging

## *Tips from the Workshop Panelists*

### ❖ **Per Scholas**

- ***Communicate early and often***

Communicate early what success looks like and the steps the organization will be taking to get there. If a messaging strategy is only partly developed, referral resources are unavailable or experts participate partway through the process it can become confusing and burdensome for staff to navigate a new communications plan. Per Scholas invested heavily in developing the appropriate documentation, brandbook, referral documents and experts who prepared messaging workshops before the change was introduced.

- ***Training and Workshops***

Provide avenues for feedback, questions and opportunities for constituents and employees to learn alongside one another. The Per Scholas Marketing and Communications Department developed Brand and Messaging trainings that often took on multiple parts and involved small four to five person workshops spread out over several months. The first part provided a discussion on the Per Scholas brand, the spaces we work, our core values and mission. The second section included multiple intensive messaging workshops that offered staff the chance to refer to previously mentioned materials, role play and practice the new messaging with one another

Externally, Per Scholas leadership met with key funders and employer partners so they could understand our shift in language. This was a critical piece in the process, otherwise many constituents who have supported the organization for almost twenty years may have been concerned with a mission shift as opposed to a new messaging strategy.

### ❖ **Leake & Watts**

- **Use the Voices from your Programs Whenever You Can!** - At special events and in appeals, let your program participants do the talking. Nothing brings in a donor like a personal connection. A five-minute speech from a program participant (foster youth, parent of a child with a disability, etc.) is so much more meaningful than the speech from the CEO.
- **Remember to Listen** - Listening is one of the cornerstones of positive communication. Take every opportunity to listen to stakeholders – students, parents, foster parents, staff, donors – to inform programming. Then, once you've incorporated feedback to either launch a new initiative or address a challenge, circle back with stakeholders and *tell* them what actions you've taken specifically. Even if you think folks will notice the change, you have the opportunity to communicate your responsiveness and demonstrate that your programming is constantly evolving and sensitive to community and client needs.
- **Information is Power** – Take the opportunity to communicate with staff, clients, donors, government officials, etc. in real time about issues and programming that may impact them. When you inform stakeholders about your successes, as well as your challenges, as they happen, you demonstrate transparency and build trust. Donors love to hear how their dollars are having an impact so send out that eNews. Staff want to know about upcoming changes so be sure to tell them about a management change before they hear it from others. By putting information out there, you bring stakeholders closer into the fold as well as prevent any rumors before they start.

## New York Community Trust Nonprofit Excellence Awards

### 32 Winning Organizations 2007 - 2016

- **America Needs You**, 2015 Winner
- **BRC**, 2015 Winner
- **BronxWorks**, 2013 Winner
- **Center for Urban Community Services**, 2007 Winner
- **City Harvest**, 2011 Winner
- **Community Health Action of Staten Island**, 2008 Winner
- **CSH**, 2013 Winner
- **Families United for Racial and Economic Equality**, 2007 Winner
- **God's Love We Deliver**, 2010 Winner
- **Good Shepherd Services**, 2007 Winner
- **Graham Windham**, 2014 Winner
- **Groundwork, Inc.**, 2009 Winner
- **Harlem Academy**, 2011 Winner
- **Harlem RBI**, 2009 and 2012 Winner
- **Ifetayo Cultural Arts**, 2008 Winner
- **Institute for Family Health**, 2008 Winner
- **Jewish Board of Family and Children's Services**, 2016 Winner
- **Leake & Watts**, 2014 Winner
- **Neighbors Link**, 2016 Winner
- **Neighborhood Economic Development Advocacy Project**, 2009 Winner
- **New York Cares**, 2009 Winner
- **New York Common Pantry**, 2015 Winner
- **New York Lawyers for the Public Interest**, 2010 Winner
- **Open Door Family Medical Centers**, 2012 Winner
- **Per Scholas**, 2016 Winner
- **Red Hook Initiative**, 2012 Winner
- **Row New York**, 2014 Winner
- **Sadie Nash Leadership Project**, 2010 Winner
- **Sanctuary for Families**, 2011 Winner
- **The Children's Village**, 2013 Winner
- **Vera Institute of Justice**, 2009 Winner
- **WITNESS**, 2007 Winner



FEBRUARY 13, 2017

1 PM

# TEAM MEETING AGENDA

## AGENDA ITEMS

<i>Topic</i>
1. Successes and Barriers
2. Staff/ Peer to Peer Recognition
3. Agency Updates
4. Agency Updates
5.
6.

<i>Assignments</i>
1. Come to the meeting with _____
2. Think about _____

<i>Next Meeting</i>	Date: March 13, 2017 Time: 2pm
---------------------	-----------------------------------

<i>Attendance</i>	
-------------------	--

## Mission Effectiveness Follow-Up Staff Meetings on Living Our Mission and Values

To be completed each month for each staff meeting until further notice (one report expected each month).

**Action steps:** At each meeting devote time to reviewing the staff's understanding of what success means in the program/department and how our four core values support the mission. Identify a champion who will lead this section of the meeting each time. That person will:

1. Ask for examples of success since last meeting.
2. Ask for examples of core values in action since last meeting.
3. Ask about specific barriers to success or what keeps us/them from adhering to our values.
4. Then and there, decide what change/action you (as manager) or they as staff (as a group) will do to implement a change. (Do not bounce it up/pass the buck – you are responsible, even if you must get assistance from beyond your program/department).
5. Complete form and return it to your Assistant Executive Director, with a copy to Belinda Conway and Alan Mucatel.

Program/Department

<b>Education Services</b>	<b>Residential &amp; Therapy Services</b>	<b>DD Services</b>
<input type="checkbox"/> Biondi Yonkers	RTC	<input type="checkbox"/> Popham
<input type="checkbox"/> Biondi Williamsbridge	<input type="checkbox"/> Davis	<input type="checkbox"/> 241
<b>Early Childhood Services</b>	<input type="checkbox"/> Arnstein	<input type="checkbox"/> Sevilla
<input type="checkbox"/> Brownell	<input type="checkbox"/> Brownell	<input type="checkbox"/> Azalea
<input type="checkbox"/> Ames	<input type="checkbox"/> Russell	<input type="checkbox"/> Savada
<input type="checkbox"/> CLC	<input type="checkbox"/> Iselin	<input type="checkbox"/> Campbell
<input type="checkbox"/> Dr Green	<input type="checkbox"/> Shradly	<input type="checkbox"/> McDonald
<input type="checkbox"/> Seabury	<input type="checkbox"/> Social Services	<input type="checkbox"/> MSC
<b>Clinical Services</b>	<input type="checkbox"/> Management	<input type="checkbox"/> ACCESS
<input type="checkbox"/> RTC Day	<input type="checkbox"/> Senior Management	<input type="checkbox"/> ESEMP
<input type="checkbox"/> RTC Evening	<input type="checkbox"/> Weeks	<input type="checkbox"/> AHRH
<input type="checkbox"/> Williamsbridge	<input type="checkbox"/> Wagner	<input type="checkbox"/> ISS
<b>Administration</b>	<input type="checkbox"/> 234 <sup>th</sup>	<input type="checkbox"/> Children's Services (B)
<input type="checkbox"/> MIS	<b>Children &amp; Family Services</b>	<input type="checkbox"/> Children's Services (W)
<input type="checkbox"/> Finance	<input type="checkbox"/> Manida (NSP)	<input type="checkbox"/> Group Day Hab
<input type="checkbox"/> HR/Training	<input type="checkbox"/> Family Foster Care	
<input type="checkbox"/> General Services	<input type="checkbox"/> Prevention	
<input type="checkbox"/> QA	<input type="checkbox"/> Woodfield	
X Institutional Advancement	<input type="checkbox"/> Mother/Child	

Date of staff meeting \_\_\_\_\_

# Of attendees \_\_\_\_\_ out of total staff of \_\_\_\_\_

Issues raised by staff as barriers to success/adherence to values (attach additional sheets if needed):

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

**Action Plan**

Item #	Corrective action to be taken	Who	By When
1.			
2.			
3.			

**Additional comments/issues/follow-up:**

Follow up to Barrier from Previous Meetings:

1.  
Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



## Tools or templates used in the organization that might be helpful to others

### *Internal*

- a. **Jostle** - An employee engagement intranet that allows us to align organizational goals, message accomplishments, share feedback and encouragement. For a national organization in six locations across the country it has amazing photo sharing, messaging and community building capabilities.
- b. **Town Hall** - Three times per year our President and CEO addresses the entire staff via web video in a townhall discussion. Besides for reporting on progress and updates from each of our six sites, staff are able to ask questions or comments to address their concerns.
- c. **Managing Director Emails** - We enlist the support of our six Managing Directors (leadership at each site) who rotate weekly correspondence with the entire staff with updates from their site. Although some organizations may not have multiple locations, it can be a good idea to have messaging come from all departments as well as senior leadership.

### *External*

- a. **Student Ambassadors** - Per Scholas' story is best told by our students and graduates who demonstrate the impact our organization can have on a person's income, stability and our employers' mission and bottom line and social impact. We invest time and resources preparing our students to appropriately message our organizational mission and to help them better tell the story of their personal journey before, during and after Per Scholas.
- b. **Monthly Impact Report** - A monthly branded "e-newsletter" that highlights Per Scholas accomplishments and happenings over the last month. The report consistently explores topics and uses language to reinforce the new messaging strategy for Per Scholas.

WORDS TO LIVE BY	WORDS TO AVOID
Applicant, student, graduate. “Alumnus” (singular) and “alumni” (plural), talent	Client
Young adults, young professionals, adults, individuals	Disconnected youth, opportunity youth, urban youth, out of school/out of work (sometimes referred to as “OSOW” youth)
Career	Job
Adults who are “unemployed” or “underemployed”	“Out of work adults”; “unemployed or underemployed adults”, “low wage workers”, jobless individuals
IT professional, technology professional, technologist	IT worker
Underrepresented, overlooked, untapped (in the workplace/the tech sector/the board room), ambitious, striving, rising talent, career-oriented	Low income, poor, impoverished, disadvantaged, less fortunate, underserved
Entry and mid level talent	Advanced level IT positions
Individuals who have an interest in IT	Individuals who have a basic aptitude in IT
Course, training	Program, class
Diverse, culturally diverse, people of color, communities of color	Racial and ethnic minorities
Building career pathways in technology	Pathways to Excellence: Excellence in Communications 11 Breaking the cycle of poverty

Share an Update or Shout-Out



JOINED 5 YEARS AGO

Tue, Jan 31

Congratulations to the following people...



Jerome

3 13



Kenneth Walker

Mon, Jan 30

Bolaji shared a bit of lunch time cheer by sharing a bit of cuisine from his home country in Africa. The food was delicious. This is diversity in action.



0 13

Reply to [Update](#) by Michelle Pullaro

Featured Article

## Teamwork makes the dream work!!

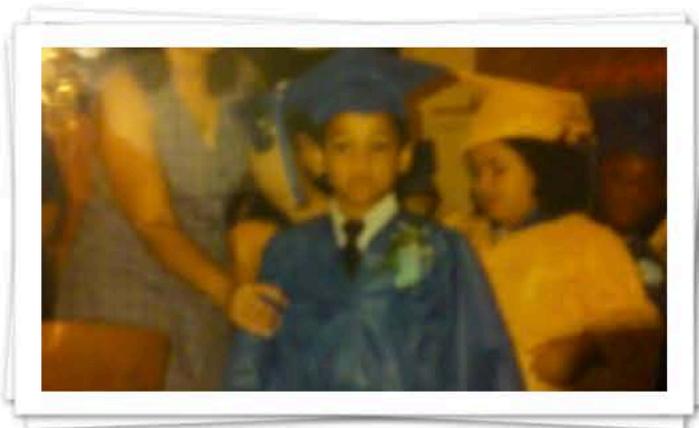


Damien Howard, Jan 23 2017

36 2 20

Album

## GUESS WHO?!?! - Scholarly Scholars work at Per Scholas



Carl-Henry Labbees, Jan 19 2017

44 4 3

Article

## Codebridge Goes to Google!

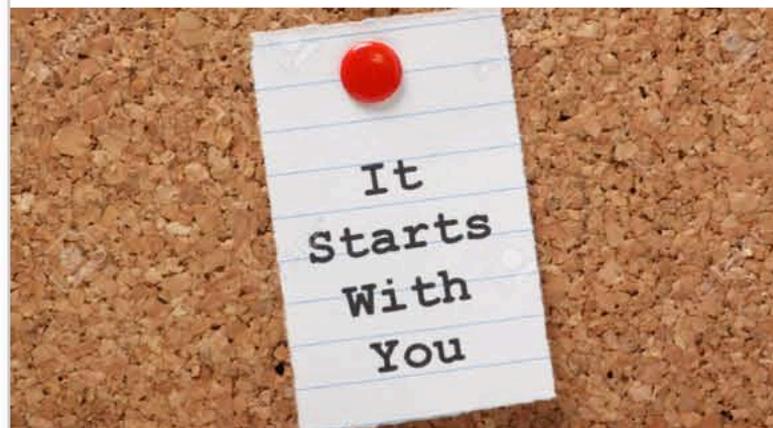


Magnardo Taverez, Jan 21 2017

31 4 13

Announcement

## 2016 Review & 2017 Goals



Michelle Pullaro, Jan 13 2017

53 2 5

Article

## Lets play a game!



Magnardo Taverez, Jan 19 2017

24 3 8

Article

## Why IT Ticket Submission is Important

Service Requests Incidents

Types of Service Requests



Record Count

Service Request Type

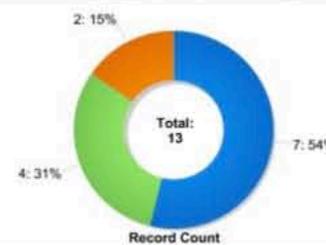
Move/Add/Change to System/Platform

Password Reset/Expired

Account Locked

Technical Incidents

Types of Technical Incidents



Record Count

Technical Incident Type

Unable to connect to WiFi

Hardware not working

No Internet access



Jerome Dazzell, Jan 13 2017

Pathways to Excellence: Excellence in Communications 12  
41 0 6





A snapshot view of impact across Per Scholas' sites and nationwide, delivered straight to your inbox each month.



## CYBERSECURITY GRADUATION

Per Scholas New York Graduates First Class of Cybersecurity Training Course Powered by Barclays

[\[READ MORE\]](#)



*"Our colleagues have worked hard to develop a strong cybersecurity training program and I have no doubt that these fourteen graduates will find success in such a crucial area of importance to the financial services industry."*

- Sameer Jain, CIO, Barclays

## Per Scholas and Thrive in the news

Successful partnership between Thrive Impact Sourcing and Per Scholas Cincinnati featured



# Signature Partner Spotlight

## JPMORGAN CHASE & CO.

JPMorgan Chase & Co. elevates conversation on diversity and inclusion in the workplace

[READ MORE]

### MEET MARC:

Per Scholas NCR Alum  
Moves from Stockroom to  
Service Desk Engineer

"This job has the potential to  
take me somewhere"

[READ MORE]



# 35%

Results show that companies in the top quartile for racial diversity are 35% more likely to outperform their competitors

# 87%

of Per Scholas students in 2016 represent racially diverse candidates for the tech workforce

Atlanta, GA | Greater Cincinnati, OH | Columbus, OH | Dallas, TX |  
National Capital Region | New York, NY

If you like what you see, share this impact report with those in your network.



