

Coheridy

Mentoring Group

Learn the message in your missionSM

Learner's Guide

A theme binds Coheridy's efforts, providing a framework and focus for all service designs. This theme is **organizational advancement** through a process of creating a **coherent message** which **brands** the institution with an **identity** that is **unique** and **authentic**. The means for helping a nonprofit move forward on the organizational maturity model is to focus on the professional advancement of each board and staff member and highly involved volunteer. Collectively, they learn to express a coherent, distinctive message which articulates the mission of the organization and is in line with perceptions of its identity.

Coheridy mentoring services empower nonprofit organizations through creation and expression of distinctive, profound identities. *Identity* stands in contrast to the currently popular topic of *branding* in that a brand is the physical/tangible expression of identity – i.e. that which can be recognized and understood by the five human senses – while identity is imbued with the emotional/intangible components of personality, coherence, distinctiveness, and direction. Coheridy actively engages the nonprofit institution in the process of discovering its core values, uniqueness, corporate culture, Zeitgeist, and place in the world (identity), while conveying a message yielding perceptions in line with its identity (branding).

Philosophy of Service Offering

Coheridy's service model is predicated upon the following philosophical components:

- All board, staff, and highly involved volunteers need to participate so that organization-wide advancement may be served.
- The focus is ongoing organization-wide improvement in expression of organizational identity.
- Our mentors have years of functional expertise and experience in the public benefit sector.
- Our mentoring involves low intensity, minimal-intrusion interactions with participants.
- Mentoring is side-by-side shared learning through the Socratic process of asking questions (as opposed to hierarchical learning - expert dispensing knowledge to the uninitiated).

The focus of Coheridy's efforts is on the organization and its advancement through the idea that the total is going to be more than the sum of the efforts of each individual. By providing service to the entire organization, Coheridy partners with the nonprofit institution; thus, institutional buy-in is the prerequisite for offering individual mentoring to its board, staff, and volunteers.

Efficacy & Validation: Branding & Organization-Wide Learning

Although the term "branding" became in vogue in the 1980's, American corporations have implemented various aspects of company and product identity development and marketplace positioning since the early 1900s. Likewise, "organizational development" as a management process was formulated in the late 1960's to offer a learner-centered variant on employee training which began decades earlier.

Coheridy founders have authored numerous manuscripts on branding and nonprofit management. The following resources are available on-line:

- For an overview of how cities and regions brand themselves as cultural tourist destinations, see: <http://coheridy.com/concept.pdf>
- To understand how brand marketing has evolved and been successfully applied in the museum world, see: <http://coheridy.com/SFO-museum-branding.pdf>
- A library of over 150 monographs on association management, leadership, and learning is cataloged at: <http://leipper.org/leadership/>

In addition to these manuscripts, research has uncovered several important documents which further corroborate learning model designs used by Coheridy. The following research reports are also available on-line:

- CompassPoint Nonprofit Services (San Francisco, CA) designed and administered a foundation-sponsored Executive Coaching Project in 2002. 24 Executive Directors from a variety of nonprofits throughout the San Francisco Bay Area received on-the-job "coaching" for a twelve-month period. Follow-up evaluation results proved the success of this mentoring-style paradigm. This demonstration project, while not institution-wide since Executive Directors were the only participants, is the closest approximation in the public benefit sector to the mentoring

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model. Both an 11-page summary and the full 74-page report are available at:

<http://www.compasspoint.org/coaching>

- According to the educational research firm Eduventures, corporations spent \$27.4 billion on employee learning in 2002. Chief Learning Officer magazine is a premier trade journal in the field of corporate learning. See: <http://www.e-learningguru.com>
- The American Society of Training and Development (ASTD) conducts annual corporate training surveys. ASTD's 2002 and 2003 industry surveys revealed that companies allocate, on average, between 1.8% and 4.1% of total payroll on training. Per-employee expenditures range from \$300 to over \$1500 per year, averaging well over \$800/year in 2002. Survey copies may be purchased from ASTD headquarters; however, executive summaries of the 2002 and 2003 surveys are posted within ASTD's website, home page at: <http://www.astd.org>

Board, staff, and volunteers in the public benefit sector need this kind of professional development to advance their careers and become brand ambassadors for their institutions. Thus, Coheridy Mentoring Group believes that nonprofits should follow the private-sector lead by undertaking board, staff, and volunteer learning as an enterprise-wide priority.

Parameters for Success

Coheridy creates an environment for organizational advancement through a shared learning process with the individuals providing essential services that further the mission of the organization. Their education will center upon becoming ambassadors for their cause, able to effectively express the mission and identity of the organization at every level in every activity. The nonprofit as a whole matures through assessment and refinement of its program practices, documentation, growth and change management, and fundamental association governance and administration.

Coheridy's professional advancement mentoring is particularly useful for highly motivated individuals who:

- Trust their own ability to manage and carry out their own learning.
- Understand that in learning you don't always get what you pay for; rather, you get out what you put in.
- Prefer practical results and powerful outcomes; e.g., plans created, budgets met, goals achieved.
- Prefer to schedule and locate their own learning experiences.

- Understand the value of self-directed learning with mentoring support in an atmosphere of trust and confidentiality.
- Prefer to share ongoing ideas, materials, and support amongst peers.
- Thrive in a state-of-the-art environment, have a sense of adventure about new experiences, and the patience for learning new ways of doing things.

Since organizational identity must ooze from the pores of every individual responsible for accomplishing the institution's mission, Coheridy's mentoring approach involves all board and staff members and high-impact volunteers in advancing their professional workplace habits. As opposed to learning specific skills and techniques (e.g., strategic planning, board retreats, fundraising, literature and website design, architectural renderings, et al., which Coheridy can provide as separate, select projects), participants work on attitudes, thinking patterns, and behaviors in the day-to-day performance of their duties. How they do things, how they think, how they learn, how they talk, how they cooperate in team settings: these attitudes and approaches all trace back to the individuals' understanding of their organization's mission and its relevance to them as individuals. How these attitudes and approaches are extended to the broader community of stakeholders thus influences how the institution is perceived and what it is all about.

Focus

Coheridy helps organizations and individuals develop and use assessment tools that promote constructive learning and skills advancement as well as teamwork and organizational advancement activities. Areas of particular focus include:

- The theories and practices of branding – knowing why branding is important to the organization and the individual, how it is done, and the role of the individual in supporting organizational branding and identity development.
- Evaluation of mission statements – being able to link the words in a mission statement to its actual practices and procedures. Being able to refine and enhance the coherence between the mission and the actual identity of the organization.
- Assessment mechanisms – being able to gain an accurate perception of how others, especially in the community at large, perceive the organization and its identity and the role of the individual in supporting the organizational brand.

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- Branding expression – learning about working with marketing and branding experts to understand how graphical and other elements that convey the appropriate identity are utilized.
- Outreach – how to market and manage the brand to introduce a new or adjusted marketplace identity. This value-added highlight provides the foundation for the institution to undertake its own internal branding campaign.

Your nonprofit organization, through the collective coherent actions of its board, staff, and volunteers who live and breathe your mission, can effectively engage the world which now identifies with you as a special institution providing valued and needed services to your community.

Measuring Results

Measurement and assessment are means for individuals and organizations to determine a starting point for continued progress. A comparison of measurements made over time for both the organization and the individuals who participate in carrying forward its mission will allow determination of success in fostering growth and advancement of capabilities.

Coheridy uses research into organizational maturity models such as that developed at Carnegie-Mellon for software process management. A maturity model provides a guide for assessment methods for the organization as a whole.

For individuals, assessments on learning styles and personality preferences supplement skills and ability measures. Assessments identify a starting point and assist the learner in how to achieve desired goals.

All assessments provide constructive feedback that can be used to direct and define learning and advancement for the individual and the organization.

Core Concepts

Problem based learning – Solving problems is learning. Coheridy mentors help learners identify and prioritize the problems they face in their day to day work. Solutions are found that incorporate appropriate consideration for organizational identity and branding.

Constructivism – The concept that learning is built upon what is already known or believed. The most efficient learning process is one that takes into account a learner's existing positions.

Organizational development – A process of improving the capabilities and capacity of an organization to improve quality of product or service.

Social entrepreneurship – A philosophy of running a nonprofit organization with for-profit values to advance social benefit in accordance with the nonprofit's mission.

Appropriate use of Technology

Coheridy Mentoring Group simplifies the training process by customizing our learning management systems to "fit" within the comfort level of your institution. You do not need to install new computers, software, data/telecom systems, or any other technologies to initiate learning.

Use of the internet in the corporate world has proven to be a most productive and cost-effective medium for enterprise-wide learning. Coheridy mentors will guide participants beyond "cyberphobia" to help them realize their comfort levels when using technology to best accomplish their daily activities.

Coheridy Ambassador Mentoring System

The Coheridy Ambassador Mentoring System (CAMS) is an individual and organizational learning system which implements the concepts outlined in this document.

CAMS will help your nonprofit organization become more effective and successful. The system is individually customized to your organization and personnel. Newly learned behaviors and values become embedded into the character of each participating learner. Corporate principles and practices of brand marketing are woven into the fabric of the mentoring process so as to guide learners in the creation and expression of their organization's unique and authentic marketplace identity.

For more information about CAMS, please contact your Coheridy representative for the *Description of Services*.

Introducing the Coheridy Mentoring Group

Michael R. Elsesser

"In our Information Age, education can no longer be the sole province of the schoolroom. Formal learning must be enhanced by a network of resources, including the richness of the museum experience. No textbook can ever capture the essence of its subject matter with the full sensory power of a firsthand visit to a museum, an institution committed to enhancing public understanding of the world within which we live through engaging, enriching, experiential learning." -- 2003. **Concept to Concrete: Blueprint for Creation of a Northern Nevada Science Center.**

Tatyana D. Sizonenko

"In today's competitive environment and the increasing pressures of the free market economy, museums have to adopt advanced marketing techniques that can bring people in the door, raise credibility in the eyes of donors and the general public, and boost revenues. One such technique is branding, or positioning, commonly defined as a promise that exists in the public's mind about who one is and what one does. Branding still is a fledgling strategy for museum administrators. Museum professionals often misunderstand branding and perceive it as a commercial, expensive, and "pigeon-holing" practice. Many do not recognize it as a core organizational strategy directly related to the museum's mission. This project argues that branding is a powerful marketing strategy that can help an organization not only to stand out among its competitors but also to articulate the motivation behind its work, mission, philosophy, artistic and intellectual values, and offerings. A major objective is to raise awareness among museum professionals about the best possible practices that can sustain the museum's core business into the future." -- 2003. **Remolding the Museum's Image Through Branding: benefits and challenges associated with branding in San Francisco bay area museums.**

Diane L. Leipper

"Volunteer programs have traditionally offered individuals an opportunity to become involved in a cause or program that is important to them. Volunteering can build teamwork and leadership skills. It can facilitate the exploration of options that may not be otherwise available. Opportunities may be found that can lead to personally satisfying endeavors or possibly career changes or paid employment. Volunteering provides the chance to work with people from a variety of backgrounds, educational experiences, and age groups.

These factors can increase a person's involvement in the community. A positive volunteer experience can be an important contribution to a sense of self worth. It can enhance self-confidence and provide a feeling of accomplishment." -- 2000. Volunteerism-Opportunities for Everyone. **Journal of Volunteer Administration.** Association of Volunteer Administration.

"A data management system, just like a volunteer, needs supervision and the active participation of the volunteer administrator to assure high quality results." -- 1997. Automated Data Management Systems for a Volunteer Program: Initial Planning. **Journal of Volunteer Administration.**

"People join groups for a variety of reasons. Whatever the reason, the fact that they want to participate is the first step in developing a productive group. Although not all reasons may be beneficial to a particular group, a good leader recognizes the potential in each individual and facilitates the development of that potential and its incorporation into a productive group process." -- **Growing Pains in Groups.** Presentation to the 2001 Nebraska Governor's Conference.

Bryan R Leipper

"People such as Peter Drucker, Tom Peters, and James Martin have discussed the revolution in business concept that we may feel in our jobs. A very visible leg of this revolution is that of technology and tools. A less visible leg is the one based on the revolution in the meaning of employee. The consultant, as an independent entrepreneur, provides an example illustrating the empowerment of the individual driven by intrinsic motivation and self discipline." -- **The Consulting Option.** Annual presentation to University of Nevada engineering students and to the 1996 International Conference of the Association for Volunteer Administration.