

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Holt Values-Based Leadership Orientation

Thursday, August 27, 2026, 10 a.m. to 12 p.m.

Hosted by, Learning and Development Director, Jessica Lombard

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Description: Kick off the 2026–2027 HOLT Values-Based Leadership™ (VBL) Fellow’s experience with an overview of the program journey, expectations, and logistics. We’ll review the cohort model, session cadence, learning commitments (including pre-work, assessments, and materials), and what it takes to successfully complete the program and capstone. You’ll also meet fellow participants and begin building relationships that support peer learning, honest reflection, and practical application.

Holt Values-Based Leadership Model and Emotional Intelligence (EQ)

Thursday, September 10, 2026, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Guy Clumpner, HOLT Development Services, Inc.

Description: The first half of this session will help participants understand the critical elements of Holt’s “Values Based Leadership” (VBL) model. The content will include a historical perspective of the evolution of VBL and its impact on individuals, organizations and institutions; the impact of transitioning to a values-based organization; and examples of effective organizational vision, mission and values elements. Fellows develop an increased awareness of values-based work practices and responsibilities; personal value systems and how personal values relate to organizational values.

Fellows comprehend the three phases of the “VBL Journey” and through examples and exercises, they develop skills in identifying alignment gaps between an organization’s values-based tools and processes to better manage and recognize and resolve performance gaps.

Key Learning:

- Concepts and philosophies of values-driven organizations
- Holt’s values-based leadership history and supporting models, tools, and processes.
- Key insights into defining organizational vision, mission, and core business values.
- Three phases of the Values-Based Leadership journey
- Impact of organizational values on day-to-day business decision-making
- Impact of core business values on future business

Pre-reading to do in Advance of this Session:

- “Creating a High Performance, Values Aligned Culture”; bring to class with questions/ comments. (copy will be provided electronically)
- Chapters 1 and 2 of “Leadership from the Inside Out: Becoming a Leader for Life” Cashman book.

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Journal Assignment and Reading to do after class and before November 14 session:

- Journal using the “Reflection” questions from Chapter 1 (pgs. 24, 34 & 38) in Cashman book.
- Download and complete the Storyline Exercise in Chapter 2 (pg. 65)
- Complete the Personal Mastery Growth Plan (pg. 43) and Story Mastery Growth Plan (pg. 73)
- Read chapters 3 and 4 of “Leadership from the Inside Out: Becoming a Leader for Life.”

Description: The second half of this session will focus on EQ. The potential to grow and be an impactful leader is not an “IQ” contest. Being the smartest or best at something is not a requisite for being an effective leader. Effective leaders integrate skills and ability with Emotional Intelligence (EQ) to maximize leadership impact.

Through a guided discussion, this workshop focuses on combining work acumen with Self Awareness, Self-Management, Social Awareness and Relationship Management skills to identify ways to enhance your leadership development journey.

Key Learning:

- Leadership is not solely based on IQ: Being the smartest or best at something is not necessary for effective leadership. Instead, integrating skills and abilities with Emotional Intelligence (EQ) is crucial.
- Emotional Intelligence components: The workshop emphasizes the importance of Self-Awareness, Self-Management, Social Awareness, and Relationship Management in enhancing leadership development.
- Building a leadership legacy: The session will focus on strategies and tactics to build awareness of what is required to create a lasting leadership impact.

Pre-reading to do in Advance of this Session:

- Preparation and assessment: Participants are required to complete an Emotional Intelligence Assessment and pre-reading assignment before the session to maximize their learning experience.

Six Levers Framework

Thursday, October 8, 2026, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Shaun Lee

Description: An organizational operating system is the system that your mission, vision and strategy run on. It runs and manages how the organization functions – from how the team interacts, to how work gets done, how leaders are developed and how decisions are made. In this session, participants learn about an operating system designed for mission-driven teams. It includes six levers that serve as a strategic operating framework. In this model, strategic planning and implementation are a core part of the way your organization operates and not something only done every 3 – 5 years. Participants will leave with actionable tools to strengthen organizational health.

Key Learning:

- Learn about an operating system for mission-driven teams
- Six key levers of organizational health: Identity, Focus, Cohesion, Rhythm, Leadership and Momentum
- How to run better meetings
- How to integrate strategic planning into the day to day

Pre-reading to do in Advance of this Session:

- 6 Levers Playbook, just enter your email address and download the book. [Compass Playbook Download \(missionmattersgroup.com\)](#)

DiSC Behavioral Profile

Thursday, November 5, 2026, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, San Antonio, TX 78216

Presenter: Guy Clumpner, HOLT Development Services, Inc.

Description: This session will provide an overview and description of the Classic DiSC behavioral style profile. A review of the 15 classic DiSC behavioral styles; description of the Johari Window, a tool which promotes greater self-awareness; greater understanding of individual behavioral work styles and communication preferences and strategies for using each participant's individual DiSC profile in work and life situations and environments.

Key Learning:

- DiSC Behavioral Profile
- Understanding differences in behavioral style
- Aligning behaviors to position requirements
- Behavioral adaptability on the job and in life
- Practical application of the DiSC system
- Modifying behavior to influence win-win outcomes.

Special Instructions: Complete DiSC Profile two weeks before class. Fellows will receive links and instructions from HDSI.

Pre-reading to do in Advance of This Session:

- Chapters 3 and 4 of “Leadership from the Inside Out: Becoming a Leader for Life”

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Holt Conflict Resolution

Thursday, December 10, 2026, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, San Antonio, TX 78216

Presenter: Guy Clumpner, HOLT Development Services, Inc.

Description: The Holt "Conflict Resolution Highway" is a highly effective process tool, which offers a safe, predictable and values aligned approach to effectively managing interpersonal and/or organizational conflict. The session will focus on appropriate ways to use the model to address and resolve conflict scenarios, while maintaining an adult-to-adult mindset. The session touches on some concepts of Neuroscience and how we can be more effective in working through conflict with the help of neuroplasticity.

Key Learning:

- The Holt Conflict Resolution Model
- Effective questioning skills
- A review of the Drama Triangle
- A review of the Adult - Child & Adult-Adult Mindsets
- Linking conflict resolution to leadership and values alignment
- Discussion and overview of the cost of unresolved conflict

Special Instructions: Complete TKI two weeks before class. Fellows will receive link and instructions from HDSI.

Pre-reading to do in Advance of This Session:

- Chapters 3 and 4 of "Leadership from the Inside Out: Becoming a Leader for Life"

Journal Assignment and Reading to do Before Next HOLT session (March 5):

- From Cashman book -- Complete the Reflection questions - Ch. 3 (pgs. 84 & 87)
- Complete the Purpose Mastery Growth Plan (pg. 99)
- Situational Leadership Overview
- Chapters 5 and 6 of "Leadership from the Inside Out: Becoming a Leader for Life"

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Building the Governance Partnership: The Chief Executive's Guide to Getting the Best from the Board

Thursday, January 7, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Jennifer Moriarty

Description: Nonprofit boards have abundant resources for clarifying their roles and strengthening their performance. Dozens of books, articles and toolkits have been developed to help board members. Much of this work acknowledges that the board and the chief executive share responsibility for governance, but little has been written about how responsibility is shared with the chief executive. This session explores the partnership between the chief executive and the board as both parties focus on the organization's mission by bringing their appropriate skills and expertise to bear on the desired results.

Key Learning:

- Fellows will identify and articulate the main ideas and strategies presented in "Building the Governance Partnership: The Chief Executive's Guide to Getting the Best from the Board."
- Fellows will engage in small group discussions to explore and present key insights from individual chapters, fostering peer learning and reflection.
- Fellows will apply the concepts learned to real-world scenarios, using practical tools and leadership strategies provided by the facilitator.
- Fellows will examine techniques for building stronger relationships with board members, emphasizing shared leadership and collaboration.
- Fellows will explore ways to stay grounded in the organization's mission while navigating governance challenges.
- Fellows will develop essential skills for transformative nonprofit leadership, including effective communication, strategic thinking, and problem-solving.

Pre-reading to do in Advance of this Session: Provided electronically in advance

Check-in Regarding HOLT Tools

Thursday, January 28, 2027, 9:00 a.m. to 11:00 a.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Guy Clumpner HOLT Development Services, Inc.

Description: Group discussions

Key learning: Reflect on how participants are using tools.

Pre-reading: N/A

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

AI & Innovation Process Management for Non-Profit Leaders

Thursday, February 4, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Dr. Laural Logan - Fain

Description: Through this course, participants will have the opportunity to hone their innovation skills and learn how to identify successful opportunities triggered by changes in technology, legal and/or regulation shifting or preferences of those they serve, execute targeted strategies that turn unmet organizational and/or client needs into actionable innovative solutions, and generate and evaluate ideas on an individual level through design thinking innovation processes and similar methodologies. Leaders will leave this class with a better understanding of the processes to foster innovation and creativity within their organization and strategies to develop a culture that embraces change.

Key Learning:

- Recognize the key concepts of innovation and understand how innovation and the rate of change in the technological world is impacting the work industry, and more broadly, the world.
- Engage in an intentional practice of cultivating a growth-oriented mindset through the application of innovative thinking.
- Evaluate and practically apply design thinking methodology as an innovative strategy that can be utilized to provide needed solutions for your professional work and personal life.

Required Resources:

- Miro account (<https://miro.com> ; sign up and create a profile; free to create a profile and use this platform; need to have accessible for in-class activities)
- Sprint book (provided by Area Foundation)
- Additional Resources:
 - Sprint Toolkit: <https://designsprintkit.withgoogle.com>
 - Sprint Site with Resources: <https://www.thesprintbook.com>

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

- IDEO Design Thinking Toolkit for Educators: <https://www.ideo.com/post/design-thinking-for-educators>

Pre-reading to do in Advance of this Session:

Sign up and create profiles (see required resources)

Situational Leadership Model

Thursday, March 4, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Guy Clumpner HOLT Development Services, Inc.

Description: Fellows learn how to develop and manage people by using a variety of leadership styles that are matched to the level of competence and commitment that employees bring to a specific task.

Fellows gain awareness and comprehension about their innate work style and into planning for self-development, through improvement of their influencing and self-management skills. You also come away with a Personalized Description and Success Strategy Plan, which is congruent with self-improvement and/or career development initiatives.

Key learning:

- Diagnosing employee development levels
- Applying varying degrees of directive and supportive behaviors to continually develop subordinates.
- Flexibility in the application of directive and supportive behaviors
- Partnering for Performance through dialogue and agreement regarding most appropriate leadership style application

Pre-reading to do Before This Session: N/A

Principles of Influence

Thursday, April 1, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Dan Norris, HOLT Development Services, Inc.

Description: Fellows will learn about effective influencing skills, which incorporate key learning from Dr. Robert Cialdini's "Principles of Persuasion".

Key learning:

- Why influencing is critical in leadership
- How we are influenced to act
- The science of influence
- Role play and reflections

Pre-reading to do Before This Session:

- Situational Leadership Overview
- Chapters 5 and 6 of "Leadership from the Inside Out: Becoming a Leader for Life"

Special Instructions: Begin to prepare for the final presentation for Capstone on May 7

Journal Assignment and Reading to do Before Next HOLT Session (May 7):

- From Cashman - Complete Ch. 5 Leadership Growth Change Mastery Plan (pg. 146)
- Ch 6 – Complete Reflections (pp. 153 & 165) and Leadership Growth Resilience Mastery Plan (pg. 166)
- Chapter 7 of "Leadership from the Inside Out: Becoming a Leader for Life"

Giving and Receiving Feedback with Confidence

Thursday, April 22, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Dr. Loral Logan - Fain

Description: This interactive workshop helps participants give and receive feedback with confidence and clarity. Building on DiSC, Conflict Resolution, and Values-Based Leadership, the session emphasizes self-awareness, emotional intelligence, and respect for differences. Through discussion, real-world scenarios, and hands-on practice, participants will learn types of feedback, what makes feedback effective, and practical frameworks for constructive dialogue. By the end, participants will feel equipped to use feedback as a tool for growth, trust, and performance improvement.

Key Learning:

- **Understand the types of feedback:** Explore appreciation, coaching, and evaluation—and when each is most appropriate.
- **Understand what impacts feedback effectiveness:** Examine the role of timing, delivery, relationships, assumptions, power dynamics, and emotional triggers.
- **Implement essential steps to provide feedback:** Learn simple, repeatable steps for preparing, delivering, and following up on feedback conversations.
- **Apply a practical feedback model:** Practice using a structured model to deliver clear, actionable, and respectful feedback.

Prep Readings and/or Resources: Review of DiSC and Conflict Styles.

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Compassion Fatigue

Thursday, May 6, 2027, 9 a.m. to 12:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, San Antonio, TX 78216

Presenter: Sinclair Ceasar, III

Description: This class helps non-profit professionals navigate compassion fatigue and burnout, focusing on the differences between burnout and secondary trauma. Participants will learn practical tools for setting boundaries and managing emotional fatigue. Through interactive activities, self-assessments, and scenario analysis, attendees will gain insights into their compassion fatigue and develop actionable self-care strategies. By the end, participants will be equipped with a deeper understanding of their emotional triggers and practical steps to maintain balance while continuing to support their communities.

Key Learning:

- Participants will learn actionable steps to foster open communication, encourage vulnerability, and create a culture where team members feel valued and supported.
- Participants will gain tools to empower their teams to share ideas, take risks, and provide constructive feedback, resulting in improved collaboration and innovation.

Pre-reading to do in Advance of this Session: N/A

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

Cultivating Psychological Safety on Your Team

Thursday, May 6, 2027, 1:00 p.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, San Antonio, TX 78216

Presenter: Sinclair Ceasar, III

Description: This session delves into the significance of psychological safety as a cornerstone for effective teamwork and overall well-being in the workplace. Participants will learn how to create an environment where team members feel comfortable sharing ideas, taking risks, and providing feedback without fear. Through practical strategies and real-world examples, attendees will discover ways to build trust, enhance collaboration, and empower individuals to bring their full selves to work.

Key Learning:

- Participants will learn actionable steps to foster open communication, encourage vulnerability, and create a culture where team members feel valued and supported.
- Participants will gain tools to empower their teams to share ideas, take risks, and provide constructive feedback, resulting in improved collaboration and innovation.

Pre-reading to do in Advance of this Session: N/A

HOLT VALUES-BASED LEADERSHIP™ FELLOWS LEADERSHIP PROGRAM

VBL – Influencing Workshop and Capstone/Testimonials

Thursday, May 27, 2027, 9 a.m. to 4:00 p.m.

Location: San Antonio Area Foundation, 155 Concord Plaza, Suite 301, SA, TX 78216

Presenter: Guy Clumpner, HOLT Development Services, Inc.

Description: This session provides an overview and discussion of Holt's proprietary Influencing Skills Model. The workshop re-visits key VBL practices from sessions 1-4 and provides a convenient reference tool for the effective modeling of previous learning.

Key Learning:

- Clarity & Choice
- Maintaining a 50,000 ft. view
- Effective Questioning Skills
- Conflict Resolution
- Principles of Persuasion

Testimonials

Description: This session will serve as a capstone event and will feature student/participant testimonials. Each participant will prepare a short (10-minute) presentation in which they share:

1. Key learnings from the program
2. Testimonials on personal growth and development

The focus is to promote and document tangible movement through the "Learn-Model-Teach-Measure" construct presented in Session 1, as evidenced by real time application of previously learned content. The session will also include Q & A and suggestions about future self-management ideas and applications

Pre-reading to do Before this Session:

- Chapter 7 of "Leadership from the Inside Out: Becoming a Leader for Life"

Special Instructions:

- Complete program Post-test after class
- Agree to complete post 3-month survey