Building Capacity Through Cohorts: What the Packard Foundation is Learning
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Why Build Capacity Through Cohorts?

There is increasing recognition that no one actor—regardless of size or influence—can solve complex social and environmental problems alone. For capacity-building funders, this means not only building critical capacities of individual leaders and organizations, but also building strategic relationships and networks across peers.¹

The David and Lucile Packard Foundation (the Foundation) believes that by building capacity through cohorts, it has the potential to improve not only individual capacity, but also to support social change on a larger scale through fostering relationships and networks. In its work over the last five years, the Foundation has experimented with a cohort model of capacity building. Their hypothesis is that the cohort model also establishes a strong infrastructure of relationships for individuals and organizations to access resources and contacts, exchange ideas, address shared issues, and act in concert to accomplish what cannot be accomplished individually, thereby strengthening the field or movement in which members of the cohort are situated.²/³

This brief examines the efforts of the Packard Foundation’s Organizational Effectiveness team over the past five years in providing cohort capacity-building opportunities to its grantee partners.

Organizational Effectiveness at the Packard Foundation

The Organizational Effectiveness (OE) team at the Foundation provides funding to increase the effectiveness of nonprofit organizations, individual leaders, and networks. OE grants primarily cover the cost of outside consultants who build capacity in one or more specific focus areas, such as strategic planning, leadership development, fund development, or communications planning. The aim of OE funding is to build capacity so that the leader, organization, or network is better equipped to achieve the change they want to see in the world.

The traditional OE grant model has long supported the capacity development of individual grantee organizations. In recent years, OE adopted an additional model of grantmaking it calls Partnership Projects.

The Partnership Project Model

Partnership Projects are grants focused on cohorts of individual leaders or grantee organizations and are designed to build the capacity of participants while they learn from their peers and grow their networks.

Partnership Projects are developed as a collaboration between OE, programs at the Foundation, grantees, an intermediary organization (which coordinates the project), and—occasionally—other funders. Projects are responsive to the particular capacity needs of a cohort of leaders, organizations, or a field or movement; their input is key to project design.

The size and scope of Partnership Projects vary widely. Cohorts have had as few as five or as many as 25 participants or participating organizations. Cohorts composed of individual leaders typically focus on leadership development. Other cohorts are made up of representatives from grantee organizations and might focus on communications, fund development, or diversity, equity, and inclusion, among other areas of capacity.

In a few cases, the cohort model was selected because it was a more efficient way to build the capacity of many grantees at once. These Partnership Projects placed less emphasis on building a network. In most cases, however, the cohort model was intended to both build capacity and to catalyze information sharing and collaboration across participants to support the Foundation’s goals around strengthening fields or movements addressing certain social and environmental issues. These Partnership Projects placed greater emphasis on building or strengthening relationships among participants.

5 Fields being groupings of individuals and organizations that share a common discipline or practice; movements being informal groupings of individuals and organizations—often across discipline, sector, and other boundaries—focused on a common issue or goal.
In 2014, The Packard Foundation’s Conservation and Science Program and OE were approached by The Surfrider Foundation about the growing need to cultivate conservation leaders along the coast of Washington State.

With The Surfrider Foundation, The Nature Conservancy, The Harder Foundation, NW Fund for the Environment, and Resource Media, OE co-funded the design and implementation of a leadership development Partnership Project called the Surfrider Leadership Academy.

An intermediary organization, Context Partners, facilitated the design process with input from the co-funders, grantee partners, and the coastal community. The vision for the cohort capacity-building project was to build hard and soft leadership skills and to foster a network of leaders who could work collaboratively on shared priorities on the coast.

So far there have been two Surfrider Leadership Academy cohorts, each composed of six to eight emerging and experienced leaders in western Washington. Leaders’ backgrounds varied; cohorts were made up of nonprofit staff as well as elected officials, political staffers, small business owners, and researchers/academics.

The same intermediary, Context Partners, facilitated the implementation of the project, which included six months of in-person retreats and virtual trainings with cohorts. The curriculum was centered around the Public Narrative framework of Marshall Ganz, who believes the most effective way to create change is through collaboration. Throughout the Surfrider Leadership Academy, participants practiced working collaboratively by designing and implementing a tangible group project.

Keeping with the networked leadership concept, alumni from each cohort have mentored and facilitated subsequent cohorts, with the goal of growing the network of conservation-minded leaders.

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Case Study / Strengthening Grantee Effectiveness in Pakistan

In 2014, The Packard Foundation’s Population and Reproductive Health (PRH) Program announced that it was shifting its funding strategy in Pakistan from funding individual organizations to consolidating funding through a single initiative.

The PRH Program partnered with OE to determine how to help grantee organizations adapt to the Foundation’s planned exit, and to maximize the impact of the Foundation’s previous investments in the region.

Grantees completed an organizational capacity assessment and participated in multiple co-design sessions facilitated by an intermediary organization, RIZ Consulting. This process resulted in a Partnership Project called Strengthening Grantee Effectiveness in Pakistan.

The Partnership Project focused on two areas—communications and advocacy—that were responsive to grantees’ capacity needs. It was composed of seven current grantee organizations. About four leaders from each organization participated in cohort activities over one year. The trainings were intended to strengthen organizations’ internal communications mechanisms, develop staff’s requisite skills for implementation, and build capacity of organizations to effectively advocate for reproductive health and rights.

This project did not aim for an explicit outcome around building a network, however, the cohort model was used so that organizations in the region would share information and learn from each other, both during and beyond the scope of the Partnership Project.
Evaluation of Partnership Projects

Evaluation Methods

In early 2017, ORS Impact conducted an evaluation of the Foundation’s Partnership Project grantmaking model. The evaluation sample included nine current and recent Partnership Projects. Four of the cohorts in the sample were composed of individual leaders, and five were composed of grantee organizations. The Partnership Projects in the sample had different focus areas, were implemented by various intermediary organizations, and were at various stages when the evaluation was conducted (e.g., a few were in progress, some had wrapped up within the last year, and others were one to two years after project completion).

Data collection included surveys with individual leaders and organizations who participated in Partnership Projects (n=67, 85% response rate), as well as interviews with a subset of project participants (n=31), program officers from OE and programs that had a role in designing projects (n=8), and some intermediary organizations that had a role in carrying out projects (n=4).

The evaluation sought to understand:
1. The effectiveness of the cohort model of capacity building
2. Whether participants experienced a “cohort effect”
3. What participants’ increased capacity and new/strengthened networks have meant for their respective fields or movements

This brief captures what the Foundation is learning about Partnership Projects and ORS Impact’s recommendations for when and how to best use a cohort model of capacity building.

Effectiveness of Partnership Projects

Partnership Projects intend to build the capacity of individual leaders or organizations in the project focus area(s) and in most cases to build meaningful relationships across participants. This section focuses on the degree to which these cohort projects effectively resulted in changes in capacity.

Most participants felt that projects were aligned with their capacity-building needs. Two thirds of participants interviewed said that the Partnership Project focus area(s) drove their participation, meaning they participated because the project focus area was particularly timely for them or their organization. This could be attributed to the fact that nearly all Partnership Projects sought input from individual leaders or organizations in the design phase.

Partnership Projects successfully increased participants’ capacity in the project focus areas. All but one individual self-reported that their capacity somewhat or greatly increased as a result of participating in the project. (n = 69)

- 61% (42) greatly increased
- 38% (26) somewhat increased
- 1% (1) has not increased
Survey data indicated that participants generally agreed that the intended outcomes were achieved. OE, grantees, programs at the Foundation, and the intermediary organization work together for each Partnership Project to define a set of three to seven outcomes they expect individuals or organizations to achieve as a result of participating in the project. Outcomes typically relate to the project focus area(s); for example:

- An outcome of a leadership development project was “I have improved my ability to be a leader by learning essential hard and soft skills.”
- An outcome of a communications project was “My organization is now able to confidently create concise, compelling messages that will resonate with my organization’s target audience online.”
- An outcome of a diversity, equity, and inclusion project was “My organization has improved or developed strategies to diversify our staff and board.”

Outcomes achievement was strongest for leadership development projects.

Interview data confirmed that participants were putting what they learned or gained into practice. Participants we interviewed, including from projects that were still in progress, illustrated ways in which they are more effective. For example, a number of organizations that participated in a diversity, equity, and inclusion Partnership Project described taking a more inclusive approach to working with communities. One expanded its services to include both rural and urban communities, and in doing so is “…listening, rather than coming in with our own set of desires and wants, and imposing those on the community.” Another organization also described using a more inclusive approach to working with families, including removing barriers to program access.

“We [now] make sure that we are not burdening the students with any costs for the program. [For example] we’ve offered an event outside of the program that was on a Saturday, recognizing that many of the students’ parents would not be able to physically drive them to the event, so we provided a charter bus. These are the types of things that we might not have thought about prior to starting this training.”

Changes in capacity generally held up over time. Participants we interviewed one or two years after their project ended agreed that outcomes were sustained or expanded upon since completion of the project. For example, one leader continued to revisit the training materials from a Partnership Project wrapped up in the fall of 2014.

“I think [changes held up] excellently. I’m currently looking at growing my career and I’ve been leaning on those skills and looking back onto those sessions and reading notes.”

In another example, an organization that participated in a communications and advocacy Partnership Project described how they have operationalized their internal communications strategy since the cohort capacity-building project concluded in 2016. Steps their organization has taken to enhance internal communications included developing internal communications mechanisms and establishing monthly meetings for implementing staff, senior management, and donors.
The “Cohort Effect” of Partnership Projects

Beyond building capacity, most Partnership Projects intend to foster peer learning and build and strengthen relationships among individual leaders or organizations. Evaluation data shed light on whether projects had a “cohort effect”—that is, whether participants’ exchanges with peers added value to their experience of the project, as well as whether connections between peers were built and sustained after the project ended.

All participants benefited from the peer learning format. Participating in a group learning environment was either somewhat or mostly beneficial for all participants. (n = 49).

When asked how the cohort played a role in their experience of the project, some participants said that they simply took comfort in knowing that their peers were in a similar position or faced similar challenges. For example, one organization that participated in a fund development project said that while their organization did not develop lasting relationships with others in their cohort, it was affirming to know that other organizations in their field were struggling with fund development and that they were “not alone.” We also heard that some project focus areas—like leadership development or diversity, equity, and inclusion—required participants to be somewhat vulnerable, and that such topics were more comfortable to tackle as a group, provided that there is trust.

“The comfort level between everyone and the support between everyone is really high. And it’s great because it allows us to put down our shields and really open up to each other and get to the meat of the issues where we feel like we can share our ideas and experiences in a safe environment. So, it’s really led to a truthful experience.”

Most participants described benefiting from peer exchange. Peer learning allows participants to tap into a broader range of expertise than a single facilitator or trainer can offer. It also provides opportunities to cross-pollinate with others who are struggling with related issues.6

Partnership Projects aimed to grow networks. Participants were not only enabled to exchange ideas and learn from one another; in most cases, they also built lasting relationships which are the foundation of networks.7 More than half of the Partnership Projects in our sample, including all of the leadership development projects, had one or two explicit outcomes identified in the project design related to participants building and sustaining relationships with their peers in the cohort. Examples of cohort outcomes included “I have built lasting peer relationships,” and “My organization has increased our collaboration and networking among participating nonprofits.”

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When explicit cohort outcomes were set, nearly all participants agreed the outcomes were achieved.*

*Only 5 of the 9 projects in our sample had explicit cohort outcomes.

Many participants continued to connect with one another after the project wrapped up. Participants from all projects in our sample were asked whether they were still in contact with others from their cohort and what those interactions looked like. Two types of connections emerged from participants’ interview responses: information-sharing relationships and collaborations.

All of the Partnership Projects in our sample resulted in at least some information-sharing connections. Connections were categorized as information-sharing if participants reported that they met up for coffee or happy hour, connected at field-level gatherings, called/emailed one another with questions, exchanged information or resources related to their field/issue area, or invited one another to their organization’s events. Information sharing often extended beyond the project focus area(s).

One participant commented:

“I have been able to reach out to those individuals that I’ve been in the training with and ask other questions about other stuff. It really just created this bond between us where we can just share knowledge and information and build each other up ... [so we are] not reinventing the wheel and [are] getting information from each other to help with other activities in the [field].”

A few participants gave examples of collaborations. Connections were categorized as collaborative if participants reported that they aligned or partnered around a shared goal or solution. For example, two land trusts that participated in a diversity, equity, and inclusion Partnership Project established a “sister land trust” relationship, in which they would host one another for site visits and regularly coordinate around how to embed diversity, equity, and inclusion into their organizations.

“The most significant example is the sharing that we put together with [another participating organization] to go to their project area and meet with their diversity, equity, and inclusion partners and spend a couple of days looking at what they’re doing and how they’re approaching that. And then later [this year] they’ll be coming here to do the same.”
In another example, two organizations that participated in a fund development Partnership Project formally partnered around a summer reading and family engagement initiative. Although this collaboration was unrelated to the project focus area, the organizations attributed it to their participation in the Partnership Project.

“We help to source families for their initiative, and they provide us with resources and workshops for our staff.”

Leadership development Partnership Projects more frequently fostered information-sharing and collaborative relationships. Individual leaders were more likely than organizations to sustain connections with their peers after completion of the Partnership Project. This could be attributed to the fact that each of the four leadership development projects used a curriculum grounded in a networked leadership approach, which promotes collaboration beyond the walls of individual organizations. One intermediary had this to say:

“The principles of networked leadership: working together instead of working individually; understanding that partnerships are more powerful than individual action. I think we definitely see that happening.”

A few individual leaders reported instances of connecting across cohorts. For Partnership Projects in our sample that had more than one cohort, participants reported that cohorts were brought together at movement- or field-level gatherings. Access to these additional connections enables diffusion of information, ideas, and other resources more widely and can extend the reach and influence of networks. 8/9

Other participants indicated a readiness to connect, even if they had yet to make a post-project connection.

“I have this common experience with other folks in these organizations where I feel confident I can call them up and ask a question.”

Networks may lie dormant for a while, but activate quickly when necessary. 10 Thus, we considered those who said they “would” or “could” connect with others as a positive outcome, in that it allows individual leaders or organizations to easily communicate or self-organize if a relevant opportunity emerges.

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Impact of Capacity and Network Building on Fields and Movements

The Foundation’s assumption is that, over time, the new/strengthened networks and increased capacity of the actors in those networks will lead to stronger fields and movements. While it’s still early, our evaluation sought to understand whether there were any examples of field- or movement-level outcomes that occurred as a result of Partnership Projects.

A few participants shared examples of what participating in a Partnership Project has meant for their respective fields or movements. One cohort composed of five leaders in the sustainable seafood movement collectively developed a white paper for their group project on human rights violations, labor exploitation, and other social and economic issues impacting seafood supply chains. Participants reported that the white paper catalyzed the Conservation Alliance for Seafood Solutions—an alliance of NGOs and hub for the sustainable seafood movement—to reference social issues in its theory of change and Common Vision for Sustainable Seafood.¹¹ The cohort’s work raised the profile of social issues in the movement and the alliance reportedly “...drew a lot from the [white] paper.”

A leader from another cohort helped create an “informal alliance of personalities” at an international field-level gathering—a concept they said was reinforced by their participation in the Partnership Project. The purpose of this alliance was for individuals in the field to share ideas, information, and connections around a shared conservation goal.

One organization that participated in a diversity, equity, and inclusion Partnership Project forged partnerships with groups that represent African-American and Latino populations in their respective field. When the organization has positions open, it now routes opportunities through these groups with the intention of recruiting a more diverse pool of candidates.

The aforementioned examples of individual leaders and organizations connecting—both within and across cohorts—are also strong indications that Partnership Projects are strengthening the fields and movements in which individual leaders and organizations are situated. Additionally, there were a few instances where individual leaders connected people from their cohort with others in their respective field.

The purpose of strengthening fields and movements in the areas that the Foundation works is to enable or amplify program impact. Individual leaders or organizations did not report evidence of impact—i.e., stronger outcomes for the people or places that are the target of their work. That said, a number of participants described improvements made to the design, reach, and/or quality of their programmatic work, which are precursors to impact.

¹¹ The Common Vision, which outlines steps businesses (across the seafood supply chain) can take to deliver on their sustainability commitments, now acknowledges that human rights are an important aspect of sustainability.
Recommendations

Findings suggest that Partnership Projects, like OE’s traditional grants, are effective for building capacity in the project focus area(s). The model has also demonstrated that participants experience the added benefits of learning from their peers and—in many cases—growing their networks. This section captures what we’ve learned about when the cohort model of capacity building is best suited, and how those designing and/or implementing cohort capacity-building projects can maximize the effectiveness of the model.

When the Cohort Model of Capacity Building is Best Suited

In addition to talking to Partnership Project participants, ORS Impact also interviewed eight program officers (POs), representing OE and three of the Foundation’s major program areas, to understand how funders experience the cohort model of capacity building.

**POs largely felt that Partnership Projects were best suited when the Foundation had goals around strengthening fields or movements.** Partnership Projects that were designed to work in a cohort purely as a more efficient way to build the capacity of many grantees at once were not seen to be as effective of a model.

**POs did not view Partnership Projects as a replacement for OE grants to individual organizations.** Rather, they recognized that Partnership Projects were complementary to traditional OE grants and appreciated having another capacity-building tool in their toolkit. This Program Officer commented:

“It’s really hard to compare the Partnership Project [to traditional OE grants] because it’s just a different way [to build capacity] and there is a need for both.”

How to Maximize Effectiveness of the Model

When designing and implementing cohort capacity-building projects, funders and intermediary organizations should be thoughtful about participant composition, project scope and components, and what makes for a strong facilitator.

The following are recommendations for maximizing the effectiveness of the cohort model of capacity building from this group of Partnership Projects.
Building Capacity Through Cohorts

What the Packard Foundation is Learning

01 / Participant Composition

People who bring diverse perspectives. New thinking comes from the meeting of different fields, levels of experience, and perspectives.12 Almost all participants appreciated the diversity of their cohort and reported that this enhanced their experience of the project.

» Keep cohorts varied in terms of participants’ backgrounds, levels of experience, roles in their respective organization, etc.

Geography or field-level venues. Not surprisingly, participants were more likely to connect after the Partnership Project ended if they lived in geographic proximity to one another and/or participated in regular field- or movement-level gatherings. For example, two of the Partnership Projects in our sample were made up of emerging leaders in the sustainable seafood movement, and participants reportedly organized a happy hour at an annual seafood show of movement actors.

» Consider whether cohorts will be able to conveniently connect post-project.

» When there are two or more cohorts of the same Partnership Project, bring alumni together to continue to grow the network.

Multiple members of an organization. Staff turnover—while not unique to Partnership Projects—sometimes came up in interviews as a barrier to organizations being able to put what they learned or gained into practice, particularly if staff left the organization soon after the completion of the Partnership Project.13

» When organizations are the ‘unit of change,’ have more than one person per organization participate to help institutionalize changes and protect organizations from the impacts of turnover on the work.

02 / Project Scope and Components

Clear and reasonable expectations. Nearly two thirds of participants mentioned not having the time and bandwidth to put what they learned or gained into practice. This barrier is consistent with what OE has found with its traditional grants to individual organizations.

» Communicate expectations about the amount of time participants will need to invest in Partnership Projects, so that they (and their organizations) can carve out the appropriate time.

In-person gatherings. Partnership Projects typically had a mix of in-person and virtual trainings or work sessions. Cohorts that were place-based could convene more regularly, however, all Partnership Projects included at least two to three in-person gatherings. In-person gatherings were described as more effective than virtual ones, in that participants could “unplug” from their everyday work and be fully present.

» Prioritize in-person work sessions or retreats, even if it is time- or resource-intensive.

Interactive tools and techniques. Most individual leaders reported that the training curriculum and/or the accompanying tools or techniques contributed to their progress toward achieving outcomes. Most individual leaders gave examples of how they have used the various tools or techniques in their own practice. One leader who participated in a conservation Partnership Project described using Community-Centered Design—another technique they learned from the project—to engage stakeholders in the design of a project and to communicate the results back to that community.

» Use a mix of tools and techniques to keep trainings/work sessions highly interactive.


13 Partnership Projects where individual leaders were the ‘unit of change’ were not designed to strengthen specific organizations, but rather fields or movements to which leaders belonged. Leaders who switched jobs after participating in Partnership Projects said they were able to apply their increased capacity to their new job. However, our evaluation cannot speak to whether staff who left grantee organizations were able to apply what they learned to their new jobs.
Engaging and responsive facilitators. Consistent with what OE has found in evaluations of its traditional OE grants, consultants can “make or break” the grant experience. Descriptions of facilitators’ strengths included communicating clearly, listening, inviting openness and dialogue, and keeping participants on track. Several participants also mentioned that they gave input along the way (via surveys or informal conversations) and that facilitators were usually responsive to their feedback and made course corrections.

- Solicit regular participant feedback and make course corrections during and between cohorts.

Balance of tailored support. Most Partnership Projects were designed to include a technical assistance (TA) or coaching component, where individual leaders or organizations were given a set number of hours to spend one-on-one with the project facilitator. For these projects, data suggested that one-on-one support was useful for tailoring content to the needs of individual leaders or organizations.

One participating organization suggested creating an opportunity for organizations to share what they had learned from their TA or coaching with others in the cohort to maximize peer learning.

- Include some targeted, one-on-one support but not at the expense of fostering peer learning or building lasting relationships.

- Provide the space for participants to share what they learned from their one-on-one TA or coaching.

We also heard that when facilitators checked in with participants between trainings, it “kept content fresh” and helped individual leaders or organizations maintain momentum. One participant had this to say:

“It was just the idea of having somebody to check in with... just the accountability of somebody saying ‘Okay, these are the ten things you need to work on and then I’m going to check on you in a month.’ That was huge.”

- Check in with participants between trainings/work sessions.
Parting Thoughts

Organizational Effectiveness at the Packard Foundation has long supported individual leaders and organizations in becoming stronger and more resilient. Over the past five years, OE has also invested in Partnership Projects for building the capacity of individual leaders or organizations while they learn from their peers and grow their networks.

Here is what we learned about our three major questions about the Partnership Project model:

1. Did participants experience changes in capacity as a result of participating in Partnership Projects?

   Like OE’s traditional grants, there is evidence that the Partnership Project model is an effective model for building capacity in the project focus area(s). Participants usually agreed that the intended outcomes were achieved and held up over time. The most prevalent challenges—having the bandwidth to put what they learned or gained into practice and having staff who participated in projects transition out of the organization—were also consistent with what we’ve heard from recipients of OE’s individual grants.

2. Did participants experience a “cohort effect”?

   All individual leaders and organizations indicated that the cohort added value to their experience of the Partnership Project. Additionally, many participants left these projects with a stronger network of individuals or organizations (within their respective field or movement) they can go to for ideas, information, connections, or to coordinate resources and actions. There was even some evidence of participants connecting across cohorts of a Partnership Project.

3. What impact did participants’ increased capacity and new/strengthened networks have on their respective fields or movements?

   Our evaluation captured a few illustrative examples of how building and strengthening networks and the capacity of the actors in those networks leads to strengthened fields or movements. We expect that any resulting program impacts will take time to come to fruition. Future exploration of the degree to which Partnership Projects help further the Foundation’s and grantees’ goals may be useful.

Partnership Projects are a promising model, particularly when having grantees share information or collaborate (rather than work in isolation) is key to achieving impact. We regard this brief as an opportunity for others to learn from the Foundation’s investments in cohort capacity building and encourage continued experimentation in this space.
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