propel*next*

Final Learning and Evaluation Report
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Becoming a Learning Organization: Propel*Next* California 2018 Cohort

harder + co community research

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Executive Summary

Propel*Next* is an intensive cohort-based, capacity-building program designed by the Edna McConnell Clark Foundation (EMCF) to enhance the performance of promising nonprofits that serve America's disadvantaged youth. In partnership with the William and Flora Hewlett Foundation, the David and Lucile Packard Foundation, the Sobrato Family Foundation, and the Weingart Foundation, EMCF launched the second cohort in 2015 comprised of 14 nonprofits in Southern and Northern California.

Propel*Next* stands out from other capacity-building initiatives with the depth and breadth of support it provides to help nonprofits develop performance management practices and cultivate data-driven decision making. The supports provided by the Propel*Next* team include customized coaching, peer learning sessions, small group coaching workshops, and an online learning community (OLC). Through the three-year initiative, grantees sharpen their program models, develop theories of change (TOCs), implement performance management systems, and cultivate cultures of learning and continuous improvement.

With a commitment to learning, EMCF partnered with Engage R+D and Harder+Company Community Research to assess the context, development, and implementation of Propel*Next,* as well as generate timely insights to refine the model. The developmental evaluation also captures baseline information that can be used to assess the impact of this work over time. The evaluation synthesizes data from a multitude of sources and perspectives using mixed methods that include surveys, interviews, focus groups, site visits, meeting observations, and document review.

Findings from the evaluation demonstrate that Propel*Next* has provided a solid foundation and has helped to catalyze organizations into a new space. While grantees acknowledge the road ahead will likely be full of bumps and detours, they have acquired new knowledge, skills and capabilities to weather the ride. This executive summary, and the full report, highlight key results and insights about the challenges, facilitators, and nuances of building a learning organization.

"It's like you're sling-shotted into a level of sophistication with an entirely new language. You don't speak English anymore. You speak Propel."

– Leader

Results and Key Takeaways

Organizations are implementing well-designed programs with increased fidelity and measurable outcomes | Grantees have developed research-informed program models and are making improvements based on data. They have gained clarity and confidence and have built skills to design, test, and implement programs with fidelity. At the end of Propel*Next*, data use practices have permeated the leadership and management teams, and leaders are working to extend these practices to frontline staff.

- **Well-designed evidence-based programs:** Overall, grantees have made significant progress providing services based on program models that are evidence-based with clear target populations, outcomes, phasing, and dosage. Since Propel*Next* began, nearly all (88%) organizational leaders said they are progressing or at an advanced stage of implementing programs based on codified models, compared to three percent pre-Propel*Next*. This trajectory is similar to the National 2015 Cohort, in which 83 percent of leaders said they had substantially met or were at an advanced

stage with this practice, compared to six percent prior to Propel*Next*.

- **Strengthening fidelity and accountability:** Grantees are becoming more attuned to program fidelity and processes for ensuring accountability. Several organizations have changed the structure of meetings to improve program fidelity, but they acknowledged that it's still a work in progress. A noteworthy indicator of progress is the addition of an individual or team that is responsible for monitoring fidelity to the program model and theory of change. Only six percent of leaders reported progressing or being at an advanced stage of having dedicated staff who monitor fidelity prior to Propel*Next.* By the end of year three, 75 percent of organizations were progressing or at an advanced stage. At two years post-program, 56 percent of the National 2015 Cohort reported they were at an advanced stage, and 31 percent had substantially met this goal, suggesting that the California 2018 Cohort is on a similar track.

- **Strengthening focus on outcomes for youth:** Given the developmental phase of the pilot programs, it's still premature to fully assess improvements in youth outcomes; however, grantees are gaining clarity and building capacity to more accurately identify and gather meaningful outcomes for participants. Despite the lengthy trajectory for tracking outcomes, 85 percent of organizations demonstrated that they had met at least one of their program progress indicators and outcomes by the end of Propel*Next*. Grantee progress was also evident from the grantees' year two to year three data reports as program implementation deepened with new cohorts of young people. For example, an education-based program that tracks reading level found that Lexile levels improved from year two to year three, from an average gain of 64 points to a gain of 103.2 points. Overall, there were higher rates of referral, enrollment, participation, and retention of program participants evidenced in year three data reports compared to year two. Many of the organizations also had notable increases in the rate at which participants achieved program outcomes year over year. The year three data reports also showed increased sophistication in analysis of their target population.

"The best practices actually indicated [the way we were originally designing the project] wasn't effective. In fact, it can cause negative outcomes if it's implemented that way. Without doing that research, we would've blundered forward."

- Staff member

Organizations have more robust systems, infrastructure, and capacity to support data use | Grantees have been implementing and refining data systems to systematically collect and use data. While some have had technical challenges, the vast majority said having a centralized system has been a significant achievement. They are also building their human capacity to train staff to use data for continuous improvement. Most grantees now have at least one or more full-time staff dedicated to data and strategic learning.

- **Strengthening capacity of frontline staff to use data effectively:** By the end of Propel*Next*, 79 percent of organizations reported they are progressing or at an advanced stage of ensuring staff have access to data, compared to nine percent at the beginning. In addition to data access, organizations are building their muscle to use data. Some of the ways in which frontline staff are engaging with data include entering their own data, running reports, and engaging in analytic discussions with their teams. A staff survey also indicates staff are becoming more confident using, interpreting, and engaging in data discussions.

- **Building internal learning and evaluation team:** Prior to Propel*Next*, very few grantees had a full-time person dedicated to data use and strategic learning. By the end of Propel*Next*, 36 percent said they were progressing, and 58 percent said they were in an advanced stage. By the end of the program, most grantees have approximately one full-time person and several have 2-3 full-time team members dedicated to this function. Interviews

with organizational leaders and meeting observations provided additional evidence that these positions are bolstering efforts to spread and deepen a data-focused culture across programs and departments.

"We changed from focusing on outputs, like how many hours, what's the average attendance…[to] what do you see? How can you intervene? What can you learn? I think we started framing [data] in a different way."

–Leader

Leaders are modeling data use practices and inspiring a learning culture | In addition to engaging staff, leaders are strengthening their leadership teams and engaging their boards in strategic learning. Navigating change has been, and continues to be, a work in progress; but leaders have gained new skills and insights for managing both challenges and opportunities.

- **Inspiring a culture of inquiry and learning:** Organizational leaders are encouraging curiosity by creating more space and opportunities to engage staff in reflecting on results and discussing opportunities for improvement. Prior to Propel*Next*, 66 percent of leaders said this was not a common practice. By the end of Propel*Next*, 82 percent said they were progressing or in advanced stage of implementing this practice. This trend mirrors the progression observed with the National 2015 Cohort. When staff were asked whether a culture of inquiry was present across all levels of the organization, most said the organization was making progress (46%) or in an advanced stage of implementing this practice (34%). These data provide further evidence a culture shift is taking root.

- **Modeling a reflective practice and data-driven decision making:** At the beginning of Propel*Next*, most organizational leaders (85%) said they did not regularly share program and organizational results with the staff and board. Three years later, there was a notable shift, with 79 percent of leaders indicating they were making progress or in an advanced stage of implementing this practice. Acknowledging and learning from failure are other important practices that spark reflection and continuous improvement and survey results provide further evidence that this is taking place.

Leaders are intentionally aligning talent management with organizational needs and performance goals | Several organizations have been restructuring, creating new positions, and assessing talent needs to more effectively support their work. Some organizations have experienced signficant staff turnover which, while challenging, has created opportunities to recruit staff with new skillsets. They are also working to clarify new performance expectations and are implementing creative strategies to energize staff.

"We've made shifts to our program model as a result of either looking at data or team meetings – [asking questions] like what is and isn't working? What do we need to do? We haven't remained static through this process."

- Leader

- **Getting the right people in the right seats:** At the beginning of the program, the concept of talent alignment was not really on the radar for most leaders, and the vast majority (94%) either weren't sure or were in very early stages of "getting the right people in the right seats." The Propel*Next* program created greater awareness about what it means both conceptually and in practice to align individual strengths and skills with the appropriate responsibilities and expectations. Despite, or perhaps because of, recent staff turnover, 82 percent of leaders felt they had made strong progress in this area.
- **Communicating expectations and standards of excellence:** Upon completion of Propel*Next*, most grantees are still in the early phase of this evolving process but clearly recognize the importance of communicating expectations and strengthening their evaluations of staff performance. Both leaders and staff mentioned one-on-one weekly and monthly supervision check-ins as the main mechanism for communicating expectations and providing feedback. Results from the survey suggest a clear shift, with nearly 80 percent of leaders indicating managers are progressing or in an advanced stage of consistently communicating expectations and accountability, compared to 9 percent at the beginning of Propel*Next*. When asked the same question, 78 percent of staff felt their

organizations were progressing or at an advanced stage with the implementation of this practice.

Organizations are intentionally working to integrate learning and data-driven decision making across the organization | Grantees are initiating cross-department and cross-program teams to discuss and interpret data, leading to more collaboration and youth-centric programming. Several organizations said increased collaboration and breaking down silos have been the biggest achievements from Propel*Next* thus far.

- **Using data to inform operational, programmatic, and strategic decisions:** Organizational leaders reported a substantial shift in using data to inform all types of organizational decisions, rather than relying on intuition alone. Prior to Propel*Next*, most leaders (70%) acknowledged they simply did not implement, or were in an early stage of implementing, this practice; and 24 percent were unsure or unable to assess. That shifted quite dramatically by the end of Propel*Next*, with 94 percent either progressing or in an advanced stage of using data to make decisions. When surveyed, staff largely concurred with 70 percent saying their organization was progressing (52%) or in an advanced stage (18%).

- **Integrating the theory of change framework into the organization's DNA:** Most grantees have begun the process of extending the program model and theory of change frameworks to other programs and areas of the organization. These efforts have been supported by cross-departmental learning that seeks to reduce the silos and engage staff in collaborative learning. Prior to Propel*Next*, the majority did not regularly use theories of change to guide their programming. Post-Propel*Next*, 75 percent of leaders said they are progressing or in an advanced stage of integrating a theory of change framework into their organizational DNA.

"You realize what they're really up against in being able to sustain this work within their organizations and how few funders are willing to support this…the field really hasn't shifted in valuing this work or wanting to invest in this area. We still have a long way to go."

- Co-investor

Efforts to sustain momentum through fund development, partnerships and stronger communications | Sustainabilty continues to be top of mind, and grantees expressed concerns about the increased costs associated with the infrastructure and talent needed to improve quality and raise the bar. At the same time, some have been able to attract funding from new sources and believe this work has increased their profile and credibility. Several also noted instances and opportunities to strengthen relationships with funders and to influence the funding community.

- **Retaining and attracting new sources of funding:** Grantees are experiencing some success attracting and retaining funding. A total of 47 percent are at an advanced stage bringing in funding from new sources (compared to 15% pre-Propel*Next*) and 41 percent are progressing (compared to 27% pre-Propel*Next*). Survey results also reveal grantees are experiencing success retaining existing funding. At the end of Propel*Next*, 55 percent of leaders indicated advanced progress in this domain, compared to 27 percent at the start.

- **Strengthening relationships and credibility with other funders:** Grantees and co-investors reported their relationships have strengthened as a result of Propel*Next*. One co-investor explained how they are continuing to provide unrestricted support to their Propel*Next* grantees because they recognize "the real concern for most of them is how they are going to be able to sustain these specific positions given some of the infrastructure changes." The California 2018 Cohort is grappling with the real cost of operating at a higher level and staying competitive when bidding for contracts. One co-investor referred to this as "the cliff", noting "A lot of these organizations meet the challenge of being a

lot more sophisticated than they were coming in and now they need to start attracting different funders."

Concluding Remarks

Propel*Next* is a comprehensive and highly coordinated model that strives to create a sense of community and a strong peer-based learning experience. Grantees expressed gratitude for the depth, rigor, and collaborative spirit with which the funders and consulting team delivered the content and support. For most grantees, the end of the program has been bittersweet. "The process in general, as hard as it was at times, was transformative," an executive director said. "We're a completely different organization three years later." As another leader put it, "This isn't something that comes to an end. This is the beginning of what lies ahead."

Introduction

Propel*Next* is an intensive cohort-based, capacity-building program designed by the Edna McConnell Clark Foundation (EMCF) to enhance the performance of promising nonprofits that serve America's disadvantaged youth. In 2015, EMCF launched the second California-based cohort in partnership with the William and Flora Hewlett Foundation, the David and Lucile Packard Foundation, the Sobrato Family Foundation, and the Weingart Foundation.

The integrated three-year program provides unrestricted grants and comprehensive capacity-building supports to 14 youth-serving nonprofits clustered in Southern California and the San Francisco Bay Area. Grantees received up to $400,000 to support organizational growth and learning, as well as the enhancement of performance measurement systems.

Northern California Grantees

- Alternatives in Action (AIA)
- Beyond Emancipation (BE)
- Community Youth Center of San Francisco (CYC)
- East Oakland Youth Development Center (EOYDC)
- Huckleberry Youth Programs (HYP)
- Lavender Youth Recreation and Information Center (LYRIC)
- Social Advocates for Youth (SAY)
- Silicon Valley Children's Fund (SVCF)
- Teen Success, Inc. (TSI)

Southern California Grantees

- Asian Youth Center (AYC)
- Bresee Foundation (BF)
- Los Angeles Brotherhood Crusade (LABC)
- My Friend's Place (MFP)
- Reach Out West End (RO)

Propel*Next* stands out from other capacity building initiatives with its depth and breadth of technical support to develop and apply performance management tools and mindsets. EMCF works with the consulting firms LeadWell Partners and Learning for Action[1] to design and deliver program elements, including customized coaching, peer learning sessions, small group coaching workshops, and an online learning community (OLC) to Propel*Next* grantees.[2] Through the initiative, grantees sharpen their program models, develop theories of change (TOCs), implement performance management systems, and cultivate cultures of learning and continuous improvement. Ultimately, Propel*Next* seeks to ensure:[3]

[1] For more information about the consulting team, see the Propel*Next* website at http://www.propelnext.org/our-program/consulting-partners/.
[2] See Appendix B for more information about the Propel*Next* initiative.
[3] See Appendix A for Propel*Next*'s Theory of Change.

- Youth-serving organizations make better use of data to generate insights that inform their work;
- Organizations are stronger, more capable of delivering better results, and better prepared for evaluation, thus increasing the potential for funding and expansion; and
- A greater understanding of the most effective and efficient ways to build nonprofit capacity to use data for learning and ongoing improvement.

A study[4] was conducted with the first National 2015 Cohort two years after completing Propel*Next* to assess how the program has contributed to grantee organizations' progress towards these objectives. One of the key findings from the study is that nonprofits sustained, deepened, and, in many cases, advanced their performance management capacities and extended their data use practices beyond programs to other organizational functions such as talent management, fund development, and communications. In addition, former Propel*Next* grantees have also increased the number of youth they serve by a median of 53 percent and have grown their budgets by a median of 36 percent.

About the Evaluation and This Report

With a commitment to learning and continuous improvement, EMCF contracted Harder+Company Community Research and Engage R+D to conduct a developmental evaluation of Propel*Next* California. The purpose of the evaluation is to assess the context, development, and implementation of Propel*Next* and to gather baseline information that can be used to evaluate the impact of this work over time. An additional goal is to generate timely insights that support learning and adaptation of the model. The overarching areas of inquiry are:

- How are grantees progressing through Propel*Next*?
- What facilitates or supports grantees' progress in the Propel*Next* program? What hinders grantees' progress?
- How and to what extent are grantees infusing Propel*Next* learnings and practices into their organizations?

Given the evolving and iterative nature of this work, the evaluation seeks to promote ongoing learning by surfacing insights at various points in time. In addition to the annual summary reports, rapid feedback memos and learning briefs were also produced and discussed each year. Through these various learning products, the evaluation team documented the journey of the California 2018 Cohort while elevating key findings about what works and what can be refined to improve results. This final evaluation report draws upon information gathered from diverse stakeholders, including structured interviews with organizational leaders, coaches, consultants, and co-investors, as well as focus groups and surveys of program staff. The evaluation also included ongoing document review and observations of learning sessions.

[4] The link to the Propel*Next* National 2015 Cohort study.http://www.propelnext.org/fileadmin/media/Propel_Next/PDFs/PropelNext_Alumni_Study_Full_Report.pdf

Grantees	• Interviews and focus groups with 34 leaders and 44 staff from 14 grantee organizations • Surveys with 33 leaders and 44 staff from 14 grantee organizations
Coaches & Consultants	• Interviews with six coaches and consultants
Co-Investors	• Interviews with four staff from four foundations
Group Learning Sessions	• Observations of two large group learning sessions
Existing Documents	• Review of select documents and progress reports

In the third year of the evaluation, a retrospective survey was introduced to assess changes in behaviors and practices in several key domains that align with two guiding frameworks: (1) the Dimensions for Building a Learning Organization (DBLO) and (2) the Performance Practice tool.[5] The DBLO was developed by LeadWell Partners and EMCF and reflects the key operational and content areas addressed in the Propel*Next* program. In an effort to drill deeper in several key areas, the evaluation design incorporated select questions and "proof points" from the Performance Practice assessment on topics related to program design, technical infrastructure, adaptive leadership, talent development, organizational alignment, and sustainability.

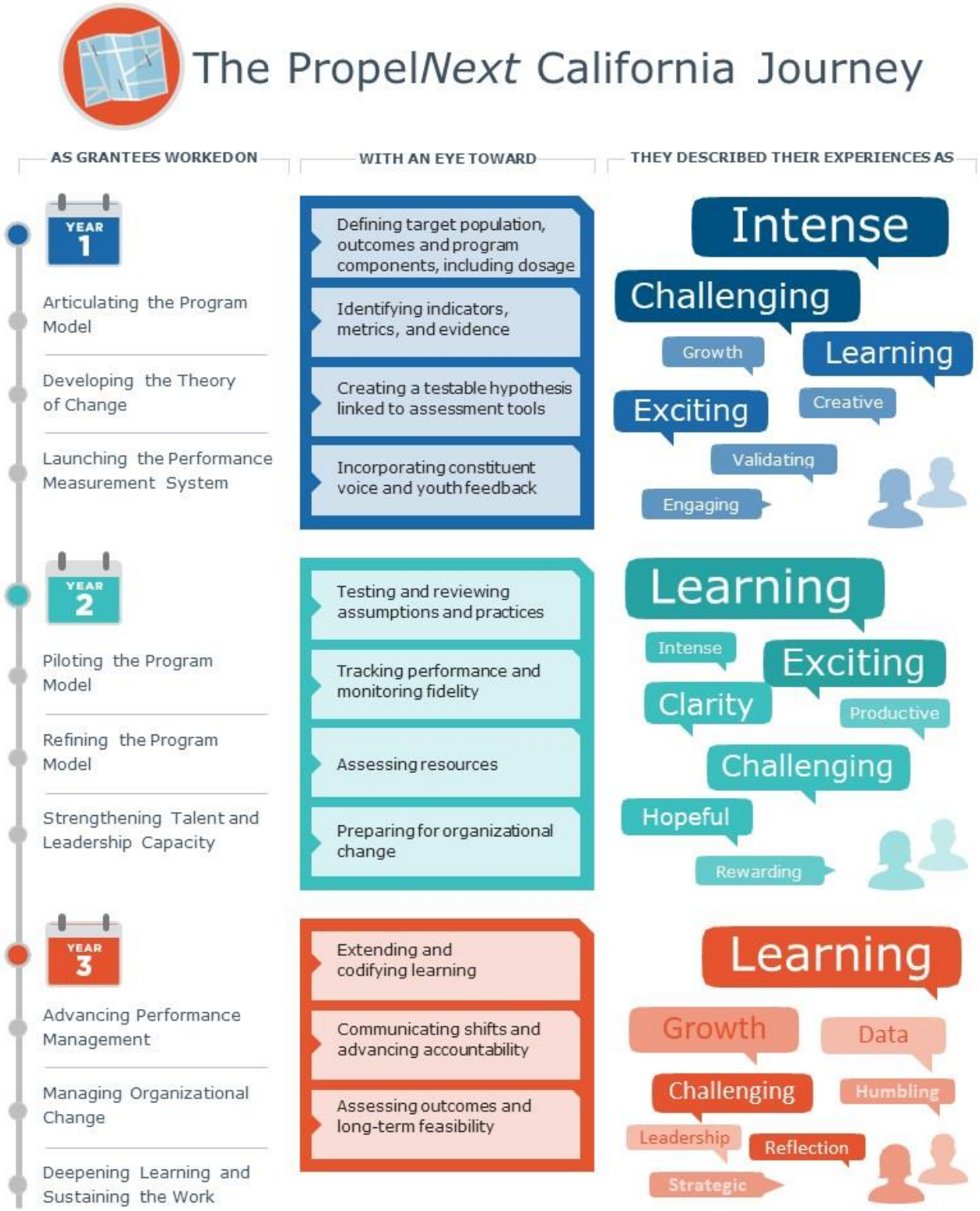
The survey gathered information from senior leaders (e.g., executive directors, CEOs, directors of learning and evaluation, program directors) to assess progress implementing key practices and proof points using a four-point continuum. We also surveyed middle managers and frontline staff at each organization using similar questions to capture their perspective. Quantitative analysis was conducted at the participant level and also rolled up to the organizational level. For the most part, results were similar between the participant and organizational analyses; but if notable differences were found, they are noted in the results section. The survey results provide quantifiable evidence of shifts in practices and mindsets that complement data collected from observations and interviews with coaches and co-investors. The same retrospective survey was also used for the study of the National 2015 Cohort, providing an opportunity to better understand the evolution and trajectory of organizations over time.[6] Throughout the report, we highlight some of the similarities across the two cohorts and conclude that despite contextual differences, both cohorts appear to be on a similar trajectory.

The report begins with a high-level journey map that highlights Propel*Next* content and grantee progress over the three years of the program. We then turn our attention to the key levers and proof points for building a learning organization, outlined in the table below. Finally, we conclude with findings on the Propel*Next* model, key takeaways, and grantee reflections on the road ahead.

[5] Performance Practice (formerly PIOSA) is a tool and framework developed collaboratively by the Leap of Reason Ambassadors Community to focus in on key organizational principles and proof points that undergird and support high performance. https://leapambassadors.org/products/piosa/

[6] See Appendix C for more information about methodology.

Program Models and Implementation	• Institutionalizing codified program models based on research, evidence, and data • Strengthening program fidelity and accountability • Listening and learning from program participants and beneficiaries
Technical Infrastructure	• Using robust data systems • Strengthening capacity of frontline staff to use data effectively • Building an internal data and evaluation function • Reflecting and thinking critically about relevance and utility of data
Adaptive Leadership and Managing Change	• Modeling and inspiring a learning and data-driven culture • Using data and research to inform organizational decisions • Exercising discipline and learning from failures Engaging the board in learning and data-driven decision making
Talent Management	• Supporting and aligning talent with organizational needs • Getting the right people in the right seats • Engaging and empowering staff • Raising the bar and clarifying performance expectations • Institutionalizing new recruitment and hiring practices
Organizational Alignment and Integration	• Using data to align programs and major initiatives with organizational strategy • Fostering cross-departmental learning and quality improvement • Systematically collecting and using data across departments and functions
Sustainability and Extending the Work	• Retaining and attracting new sources of funding • Strengthening relationships and credibility with other funders • Expanding programs and serving more youth • Strengthening strategic partnerships and credibility as field leaders • Communicating a more compelling story of impact



Note: The *word cloud* in the far-right column reflects the frequency in which grantees used certain words to describe their experience. The larger the text, the more frequently it was mentioned.

The Propel*Next* Journey

As discussed in previous reports, organizational learning is a continuous process that unfolds over time, rather than a "one and done" event. Propel*Next* challenges organizations to think in new ways, engage in experimentation, and bring more rigor to their programs and decision making. It is by nature a disruptive process that extends beyond programming and has implications for all aspects of the organization. A key driver of Propel*Next* is to support grantees in developing organizational cultures that value and foster learning and continuous improvement.

EMCF developed the Dimensions for Building a Learning Organization (DBLO) framework to assess grantee progress and key milestones as they journey through the three-year program. In the first and second year of Propel*Next*, grantees focused on designing and piloting a research-informed program model and gathering data to inform program improvement. In year three, grantees continued to codify their models and sharpen data inquiry practices, while extending performance management work across their organizations. By the end of the final year, grantees were expected to make progress in the five areas outlined below.

Key Propel*Next* Milestones

1. **Program Model and Theory of Change.** The initial program model incorporating research/evidence and well-defined TOC for the program is in place and has been refined drawing on data to inform further program modifications, consistency of implementation, and improved performance outcomes.

2. **Program Implementation.** Grantees have fully implemented the program with modifications that are informed by pilot testing and data review. Fidelity measures and progress indicators are also in place and used consistently to ensure alignment with program design and TOC.

3. **Data Collection, Reporting, and Use.** Grantees have collected and used data regularly and systematically to improve practice, programs and decision making. There is demonstrated evidence of emerging internal performance management capacity, including using data to align staff efforts with outcomes and clear performance targets.

4. **Technology and Infrastructure.** Technology (technical infrastructure and performance measurement tools), talent, organizational expectations, training, and accountability around the regular use of data have been well established.

5. **Organizational Capacity for Learning and Performance Management.** Staff performance expectations, training resources, and accountability measures are in place to use data to enhance learning and improve performance.

Overall, year-end progress reports completed by grantees and coaches indicate organizations have made notable progress in year three (see graphic to the right).[7] Across all five dimensions, a higher percentage of grantees received ratings of

[7] Data are presented for 13 of the 14 grantee organizations in the graphic because one organization received special dispensation from this activity.

"fully achieved" compared to year two with notable advances in program implementation and enhanced capacity for performance management. Key observations in year three include:

- **Program implementation**: In year two, about half (53%) of grantees had "fully achieved" this milestone, compared to more than three-quarters (85%) in year three. Year-end reports further corroborate this shift, with grantees and coaches alike pointing to examples of program modifications that were informed by pilot testing.

- **Organizational capacity for learning and performance management**: Only 47 percent of grantees "fully achieved" this milestone in year two, compared to 77 percent in year three. This shift is notable and speaks to year three's focus on supporting grantees in sustaining and extending performance management across their organizations.

- **Data collection, reporting, and use:** This proved to be the most challenging milestone, with grantees making less progress in year three. In fact, just over one-third (38%) of the cohort "partially achieved" this milestone, which is similar to the 34 percent of grantees that achieved this milestone in year two. Some of the challenges in this area include fidelity and implementation issues, staff turnover, not having the right measurement tools, and not using all available data to make programmatic shifts.

Findings from the National 2015 Cohort study confirmed that Propel*Next* often is just the beginning of the organizational learning process. In fact, just two years after completing Propel*Next*, some of the changes that alumni initially seeded during the program were just beginning to bear fruit. Both the California 2018 Cohort and the National 2015 Cohort described their Propel*Next* experience as transformational and recognized that they are still on a journey as they strive to sustain, deepen, and spread practices across their organization. This didn't go unnoticed by those around them. One co-investor said, "If there's anything I've been surprised about how much change has taken place within the organizations. From leadership down it's been pretty transformative, impacting the culture of the organization, reshaping how they think about staff, and it has shifted their thinking on how they are running their programs." In this report, we explore the nuances of building a learning organization and how grantees are embedding new knowledge, skills, and capacities into practices.

Organizational Spotlight Institutionalizing Learning

The **East Oakland Youth Development Center (EOYDC)** has been working since 1978 to develop the social and leadership capacities of youth and young adults so that they are prepared for employment, higher education, and leadership opportunities. EOYDC has four core programs: Art, Education, Careers, and Wellness.

The team at EOYDC has succeeded in providing every program lead with a customized data report template, evaluation plan, and calendar. In the final year of Propel*Next*, however, leadership realized that they needed a new position that could "focus on making sure all the programs are aligned. Particularly because the way that our programs function, they're really a continuum, and they feed into each other in a lot of ways." They decided to create a Senior Manager of Program Effectiveness who is responsible for planning, implementation, and evaluation across all programs. In conjunction with the development of this position, they have also created a role for a Data Analyst to help with data entry, analytics, and data report development. Creating the space and making the investment in this specialized team is evidence of EOYDC's commitment to learning.

Program Model Quality and Implementation

A core component of Propel*Next* is designing, testing, and refining robust data-driven programs that are guided by a strong theory of change and informed by the best available research. During the second and third years of Propel*Next,* grantees focused on piloting programs, honing program fidelity, and extending the test and learn practice to other programs. Through this process organizations were able to clarify their strategies, intended outcomes, and ultimate impact on program participants. Findings suggest that organizations have made notable progress in the following areas:

- Developing codified program models based on research and evidence
- Strengthening fidelity and accountability
- Listening and learning from program beneficiaries

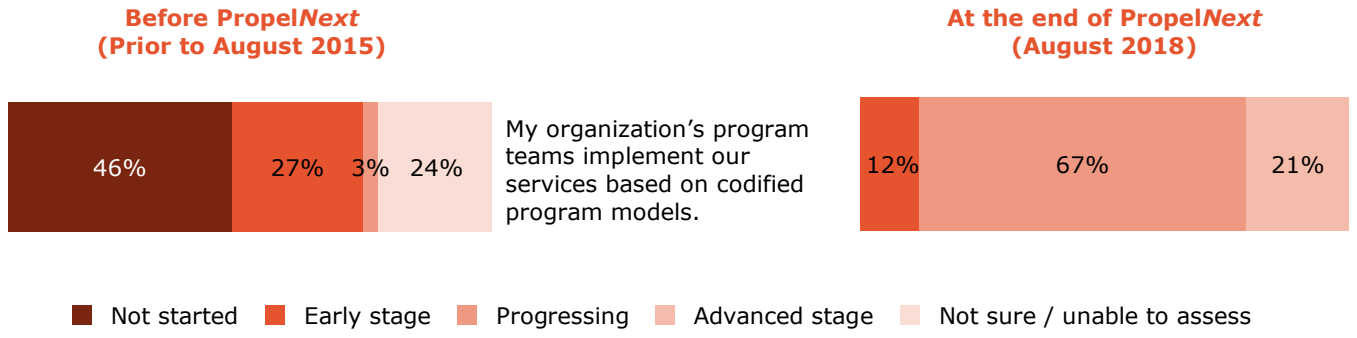
"Where we've landed is beautiful because there's no going backwards. Everybody can see their programs in a very different way, which I feel is a big win."

– Leader

Developing codified program models supported by research and evidence

Overall, grantees have made significant progress providing services based on program models that are evidence-based and have clear outcomes, phasing, and dosage of activities. Since Propel*Next* began, nearly all (88%) organizational leaders said they are progressing or at an advanced stage of implementing programs based on codified models, compared to three percent pre-Propel*Next* (see Exhibit 1).[8] This trajectory is similar to the National 2015 Cohort in which 83 percent of leaders said they had substantially or fully implemented this practice, compared to six percent prior to Propel*Next*.

Exhibit 1: The majority of organizations implement their programs based on codified program models (n=33)



When Propel*Next* began, only nine percent of organizations were progressing or at an advanced stage of collecting data about their target population and using that to determine who to serve, compared to 82 percent of organizations at the end of Propel*Next*. As part of the third year of Propel*Next,* grantees extended the TOC and program model framework to another program; and with the initial experience under their belt, the second program model went much more smoothly. They also

[8] Note that at least one leader and one staff member from each of the 14 organizations participated in the surveys.

benefitted from a succinct TOC guide book to support the process. A staff member shared, "It was much more user-friendly. I think using that refreshed tool with a new program in a much more condensed timeline was a great way to prime us to do it on our own moving forward."

Staff valued the opportunity to be actively engaged and found the process rewarding. It is however, challenging to determine how, when, and to what extent to involve other staff. One leader described staff complaints about all the meetings and trainings that didn't seem immediately pertinent to their work. Grantees are still figuring out what works best for their team; however, by and large, bringing more staff into the work early has helped to build buy-in and promote greater collaboration. Grantees have come to realize that the "learning-by-doing" process takes time but eventually the concepts begin to sink in.

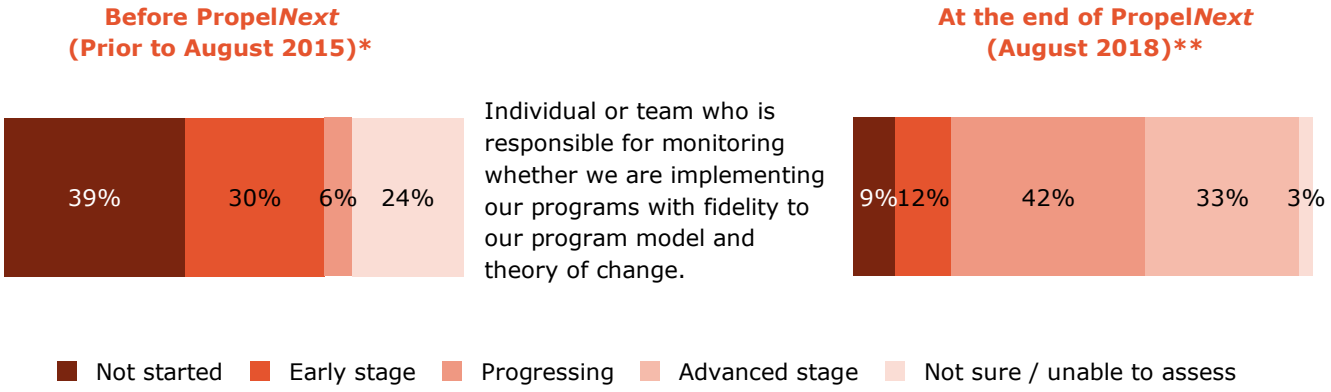
"We now have some internal expertise as we created a second theory of change. It was difficult at times for sure, but it wasn't out of our wheelhouse…we knew what we were doing."

– Leader

Strengthening fidelity and accountability

Grantees are becoming more attuned to program fidelity and processes for ensuring accountability. Several organizations have changed the structure of meetings to improve program fidelity, but they acknowledged that it's still a work in progress. A noteworthy indicator of progress is the addition of an individual or a team who is responsible for monitoring fidelity. By the end of year three, 75 percent of organizations were progressing or at an advanced stage (see Exhibit 2). At two years post-program, 87 percent of the National 2015 Cohort reported they had fully or substantially met this goal, suggesting that the California 2018 Cohort is on a similar track.

Exhibit 2: Most organizations have an individual or team responsible for tracking fidelity (n=33)



*Total does not equal to 100% due to rounding.
**"Not sure/Unable to assess" value is not labeled – it represents 3%

For many organizations, a key improvement has been the focus on outcome metrics. A co-investor observed that one organization has "really put a stake in the ground" by increasing their level of rigor and commitment to gather accurate outcome data and not rely solely on self-reported data. This required building relationships with schools and districts to make sure that the information they're gathering is as accurate as possible. In some instances, leaders expressed concern that this new level of accountability and rigor might put them at a disadvantage when comparing results with other organizations that may not be operating under the same discipline. One leader explained, "The way in which we measure our impact is more rigorous, so we're not going to count students who we know didn't fit the target population. Whereas, a lot of other organizations haven't been trained not to do that."

Listening and learning from program beneficiaries

While not a major focus of Propel*Next*, grantees were introduced to the value and benefits of beneficiary feedback. A few grantees have begun to make some improvements to the ways they gather and use participant voice. One organization has made surveys available in a variety of languages, and others are using online platforms rather than paper to improve ease and efficiency. One grantee discovered attendance dips on certain days and used focus groups to better understand the issues. At least one organization has made changes to their program model based on youth feedback. Another organization has seen a shift in the level of candor it receives from participants who "have learned how to be more critical and that their voices are being heard by the organization."

In addition, grantees appreciated the opportunity to promote youth empowerment. As one leader recounted, "Nobody asks them what they think. For a lot of systems, they are the recipients so having them provide feedback, to become part of the change they want to see, is very important." This organization has engaged program participants to plan and facilitate a summit for their peers. Another organization is involving their youth in the selection of their next program director because "young people know immediately how you show-up, if you're authentic and if you're not… we need to know that you have the ability to be engaged with our young people, because it's their voice that needs to be lifted up." Nearly all grantees are looking to strengthen this practice and 12 of the 14 are participating in *Listen for Good*, through the Fund for Shared Insight.

"Asking for feedback, listening to feedback, having action steps to deal with the changes that the youth want to make, and having them participate… it's been one of the areas that we've made a lot of improvement very quickly."

– Leader

Listen for Good Initiative

Of the 14 grantees, 12 have gone on to receive grants from Listen for Good to help them build their practice of gathering feedback from youth.

Similar to Propel*Next*, the Listen for Good Campaign was catalyzed by a small group of funders and now includes a growing group of foundations, including EMCF and the other Propel*Next* co-investors.

Strengthening the focus on outcomes for youth

While we do not have sufficient data to assess the impact of Propel*Next* on youth, there is strong evidence that grantees are gaining clarity and building their capacity to more accurately track and assess participant outcomes. There is increased focus on high quality outcome data and benchmarks as opposed to process indicators like participation rates. Emerging findings are described as a "glimmer of hope" by one grantee that found "some initial signs that we might be increasing reading level slightly faster than the baseline of the school." Some organizations are still determining the most appropriate outcome metrics. For example, one was using matriculation to 9th grade as an indicator of success only to discover the district essentially passes everyone even if they are not making the grade.

One of the final deliverables of Propel*Next* is a data report capturing the key progress indicators and outcomes associated with the program grantees piloted as part of the initiative. Exhibit 3 provides a high-level overview of the types of

indicators grantees are tracking, followed by some concrete examples of progress among program participants.

Exhibit 3: Examples of common progress and outcome indicators by program type

Program Focus	Common Progress Indicators	Common Outcome Indicators
Educational Attainment *Mentoring, tutoring, educational field trips, leadership skills, and opportunities*	School enrollment and attendance Test scores and academic achievement Disciplinary performance and behavior	Graduation rates Academic promotion or reclassification Obtaining/completing work opportunity
Workforce pathways *Job skill training, internships, and workforce readiness*	Secure Right to Work documents Work experience attendance rates Obtain relevant work certifications Demonstrate basic job readiness (resume writing, interviewing, job search, personal hygiene)	Retention of a non-temporary, unsubsidized, hourly or salaried position Enrollment in a more intensive job training Subsidized employment or vocational certification program

Progress indicators achieved: Grantees have made significant progress in tracking and achieving indicators of success. In year three, **85 percent of organizations demonstrated that they had met the target for at least one of their program's progress indicators.** The most commonly tracked progress indicators include program attendance/participation, school enrollment and attendance, and academic achievement. For example, one organization tracks participants' literacy proficiency every ten weeks during the academic year. In year three, more than three-quarters of their participants made strides in literacy that year, with data reports showing that 58 percent of participants gained 1-2 Lexile levels and that 16 percent gained more than 2 Lexile levels.

Outcomes achieved: Despite the potentially lengthy trajectory of outcome data, **85 percent of organizations demonstrated that they had met at least one of their program outcomes by the end of year three of Propel*Next*.** The top outcomes tracked include academic promotion or reclassification, attaining certification for work, test or assessment score improvement, and improved soft skills/social-emotional learning. For example, one outcome tracked by an education-based program is whether participants have completed 48 transferrable units from a community college or a vocational training program. The organization's data reports showed that 12 percent of program participants had already met this outcome, and that an additional 65 percent were on track to achieve this outcome by the end of year.

Year over year changes: Grantee progress was also evident from the grantees' year two to year three data reports as program implementation deepened with new cohorts of young people. For one program, a progress indicator is whether or not participants obtain their Right to Work documents, of which 40 percent of round two program participants had secured. As shown in the year three report, that number increased to 67 percent of round three participants.

Overall, **there are higher rates of referral, enrollment, participation, and retention of program participants evidenced in year three data reports.** Many of the organizations also had notable increases in the rate at which participants achieved program outcomes year over year. The year three data reports also showed increased sophistication in analysis of their target population.

Organizational Spotlights

Codifying Robust Program Models

Founded in 1982, **Bresee Foundation** provides a range of services to Los Angeles families, including a middle school enrichment program that helps students with homework and study skills, as well as programs related to college access, internship, Tech Center, and athletics. Since 2012, Bresee has experienced tremendous growth, including doubling the number of clients it serves from 1,500 to nearly 3,000, welcoming 25 new staff members to join the 25 staff that were already on board, and increasing their budget from $1.5 million to $3 million.

To keep track of Bresee's 12 programs, the Director of Evaluation and Learning and Director of Programs recently developed program implementation guides in partnership with each team. The guides start with a 2-3 page program summary which includes key dates, curriculum that exists or needs to be designed, and program components. More specifically, information about who owns it, start dates, target service size, the goal, components, objectives, outputs, client outcomes, and participant profiles are detailed in the guide. They are meant to be dynamic and ever-evolving guides that staff use all year long. New programs start with the advent of each school year, so the team is embarking on phase two as they work to update the guides. The Director of Learning and Evaluation said, "As with any plan, as soon as you hit the ground you're trying to revise them." Similar to the development process, program staff are involved in the revision of the guides as well. "Once they're updated, return your old one, shred it, and everybody gets a new copy of the current version. We don't want mismatched information existing. Right now [the Program Director] is leading a lot of those efforts to make sure that by the end of the month all of those are updated," explained the Director of Learning and Evaluation.

Technical Infrastructure and Systems

Propel*Next* supports organizations with the implementation of more robust data collection systems and practices. Most grantees acquired new data systems and spent the first two years setting up and testing them as part of the program pilot phase. Despite the common and sometimes painful technical challenges, grantees valued both the investment in this critical infrastructure and technical support to get them running and functional. Organizations have made important strides in the following ways:

- Using robust data systems to systematically collect data
- Strengthening capacity of frontline staff to use data effectively
- Building an internal learning and evaluation team
- Reflecting and thinking critically about relevance and utility of data

Using robust data systems to systematically collect data

Most organizations collected data in some form prior to Propel*Next*, but many lacked a centralized system. By the end of Propel*Next*, 82 percent of organizations reported that their data systems are progressing or at an advanced stage of helping gauge program effectiveness compared to nine percent before Propel*Next* began. Having ownership and control over their own data systems has created opportunities that were previously impossible given inconsistent data collection and fragmented systems.

While organizations have made significant progress in standardizing and expanding their data systems across programs and departments, there are still gaps and issues to resolve. "A lot of people within our agency are collecting data and doing their best to make sure it's accurate and timely, but the closer we look at it, the more holes we're finding," a staff member shared. "We're getting much clearer on our training needs and our own timelines." Organizations that collaborate with schools and county departments are also figuring out how to ensure their data infrastructure is compatible with others. Some are also grappling with how to best track activities that can be hard to quantify, like individual case management, coaching, and mentoring. Nearly all organizational leaders described the culture shift and the need to debunk the notion that data are used "for punitive purposes." As one leader put it, "shifting the mindset that data is not bad, data is good and we use it positively to improve performance."

Strengthening capacity of frontline staff to use data effectively

More frontline staff have access and regularly use data to improve their day-to-day work. Prior to Propel*Next*, only nine percent of organizations reported that they were progressing or at advanced stage of ensuring staff have access to data, compared to 79 percent at the end of Propel*Next*.

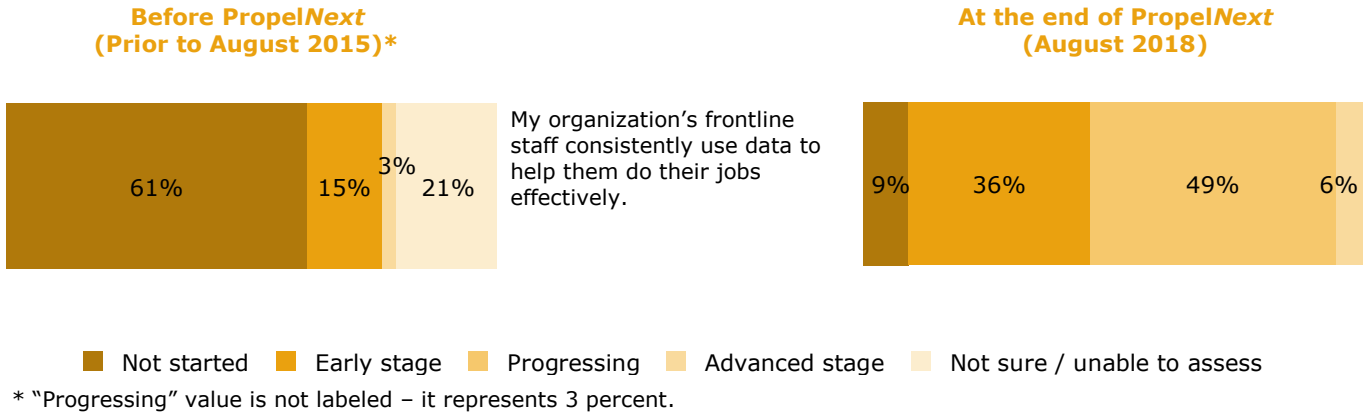
Although data access is a critical first step, developing data use practices among frontline staff can take time. Before Propel*Next,* only three percent of organizations were seeing evidence of staff using data to inform their work (see Exhibit 4). During interviews, organizational leaders openly acknowledged that data use practices are taking root at the management and executive levels, but it has not fully trickled down to frontline staff. Working with staff to actually use the data on

"As a result of the Propel*Next* work, the program team is more in the driver's seat around what outcomes are being reported, and what is being collected for the sake of reporting and numbers as opposed to real outcomes that they wanted to hold themselves to."

—Coach

a consistent basis can take more time and training as evidenced by the National 2015 Cohort.

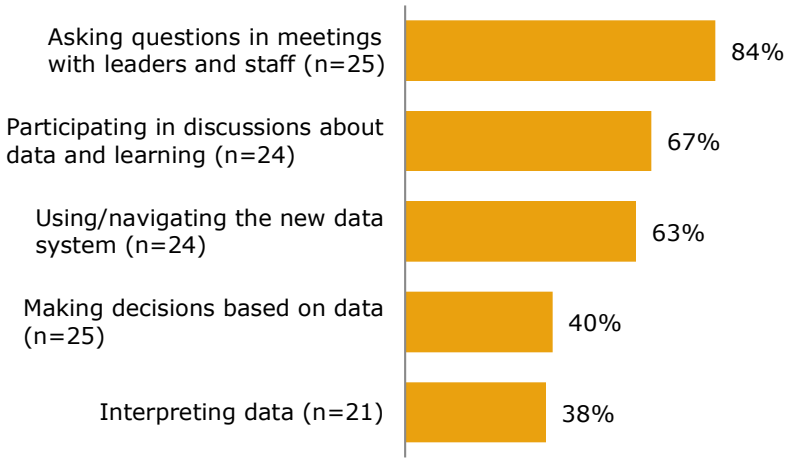
Exhibit 4: Frontline staff's use of data is increasing over time (n=33)



* "Progressing" value is not labeled – it represents 3 percent.

Frontline staff are engaging with data by entering data, running reports, and engaging in analytic discussions. The majority of staff surveyed report feeling "very" or "completely" confident asking questions in meetings with leaders and staff (84%), participating in discussions about data and learning (67%), and using or navigating the new data system (63%). However, only 40 percent of staff felt "very" or "completely" confident making decisions based on data, along with 38 percent for interpreting data (see Exhibit 5).

Exhibit 5. Percentage of frontline and program staff who are "very" or "completely" confident doing the following data activities:



Building internal learning and evaluation team

Data and evaluation staff have been instrumental in supporting data systems and facilitating data use among staff. Many have also played strategic roles bridging programs and supporting a learning culture. Prior to Propel*Next*, very few grantees had a full-time person dedicated to data and organizational learning. Only 15 percent (n=33) said they were progressing, and three percent said they were in an advanced stage of implementing that goal. By the end of Propel*Next*, 36 percent said they were progressing, and 58 percent said they were in an advanced stage. While most grantees had approximately one full-time person, several had 2-3 full-time team members dedicated to this function.

Interviews with organizational leaders and observations of meetings provided additional evidence that these positions are bolstering efforts to spread and deepen a data-focused culture. Program staff described the role as instrumental in fostering data use by facilitating discussions, providing one-on-one support, and generating customized reports.

Two challenges that bubbled up are the perceived role of data and evaluation managers as data gatekeepers and the difficulty translating data concepts into digestible and clear terms, particularly for new staff with limited exposure. Even program staff interested in digging deeper into data report having no or limited access to their data systems, creating a barrier to real-time data use. This "gatekeeper" issue was noted by staff in some of the organizations from the

National 2015 Cohort as well.
Many organizational leaders have come to appreciate the need for technical skills as well as the ability to facilitate strategic learning and engagement. Some have struggled to find that in one person. Several grantees have elevated internal talent with deep programmatic experience to facilitate strategic learning – a strategy which appears to be promising. Others are cultivating team members with an interest and data skillset and have complemented that with external hires. While there are multiple approaches, future Propel*Next* programming could include more guidance on how to assess talent gaps and assets in this area, as well as ways to cultivate internal talent with the potential to take on this critical function.

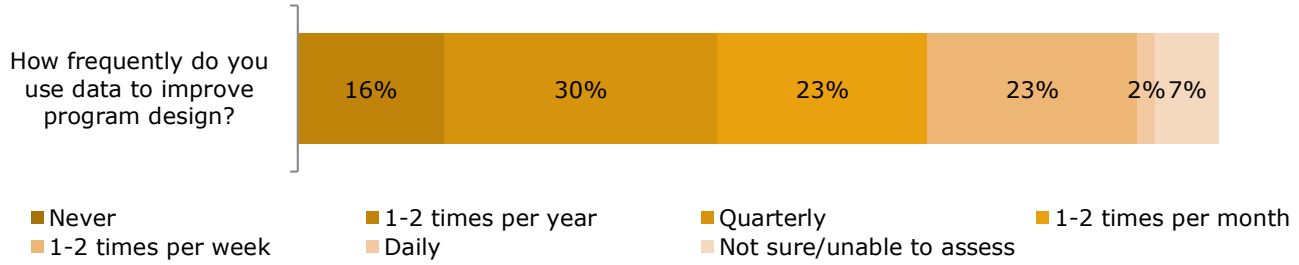
"I found it really helpful having [our data manager] sit in on our meetings and pull data reports…because it's real-time feedback about how we're getting data in and what needs to be adjusted to get more accurate and useful information out of it."

— Staff Member

Using Data to Inform Programmatic Decisions

With data systems in place, many grantees are using data to make programmatic decisions. Prior to Propel*Next,* over half (67%) of leaders reported they had not started or were in the early stage of compiling and reviewing data to refine programs and strategies. After Propel*Next*, 85 percent said they were progressing in their efforts to institutionalize this practice. Similarly, program staff reported frequent engagement with data to refine their programs (see Exhibit 6). Nearly half of all staff use data at least several times per month to improve program design, 23 percent report engaging in this practice 1-2 times per month and one-quarter are using data on a weekly basis. While we do not have a baseline comparison, focus groups and interviews with both leaders and staff clearly indicate an increase in data use among frontline staff while recognizing that this practice is still a work in progress.

Exhibit 6. Staffs' responses for how frequently they use data to improve program design*(n=44)



*Total does not equal 100% due to rounding.

One leader shared an example of using data to track and measure interactions between different groups of staff and their interaction with program components along a youth-centered continuum. Based on the data, the organization reworked the structure of their program model and made changes to foster more staff connections. Other organizations are still working out kinks in their system and building the capacity of staff to use data for program improvement. However, leaders credit Propel*Next* with helping them build the skills and capacities to move in this direction. As one leader said, "I don't know that we've made actual shifts but I do think that we're on the verge… I'm hearing [things] differently for the first time. Propel*Next* has changed my way of hearing information."

Organizational Spotlights

Fostering Team-Driven Learning

Founded in 2011, **Teen Success Inc.** works in California's Bay Area, Monterey County, and Central Valley to support pregnant and parenting teens in graduating from high school and developing the skills needed to nurture their child's positive development. As part of their commitment to continuous learning and strengthening services to the young mothers they serve, they created a new workgroup called the *Program Implementation Team* (PIT). This team has staff representatives across multiple geographies and from every level of the organization (i.e., Deputy Director, Evaluation Manager, Site Supervisors, Program and Training Managers, and Advocates/Case Managers). The Advocate/Case Manager members rotate on a quarterly basis, providing everyone an opportunity to be involved.

The purpose of these 1.5-hour monthly meetings is to review program data, progress indicators and outcomes, and to strategize approaches to address programmatic issues as they arise. The Evaluation Manager facilitates these meetings; but as the Propel*Next* evaluation team observed firsthand, Advocates/Case Managers are equally engaged in discussing and interpreting data and offering solutions alongside leaders and managers. The PIT meetings are an inspiring example of how staff from across the organization can work in collaboration to reflect on data and efficiently and effectively problem-solve.

Leaning into Data

Through their schools and community programs, **Alternatives in Action (AIA)** has been working with youth in the Bay Area since 1996 to prepare them for college, career, and community life through education, skill-building, and real-world experiences. Since they were founded over 20 years ago, AIA has served over 1,300 youth across their four sites, trained more than 8,000 youth leaders, and has been involved with 225+ community impact projects.

In the final year of Propel*Next*, leadership at AIA noticed a marked shift as staff are "leaning into data more." Staff have started to "socialize the language" about data as they experiment with different ways to interpret and use data to inform their work. In addition to more structured venues for data discussion (e.g., monthly "data parties"), the teams are trying out different methods to keep data in the foreground. For example, one of the teams that was not part of the Propel*Next* pilot program created a "data wall" where recent program data (charts, graphs, etc.) are displayed in a common staff area. They are continuing to devise other ways to help staff make sense of the abundance of data, but "one thing that's clear is [staff] are really invested in these kids and that the data is telling them something."

Cultivating Curiosity

Since 1969, **Reach Out (RO)** has been providing community members with equal access to networks of support, quality education, career options, and opportunities to develop skills to succeed in San Bernardino and Riverside Counties. Their youth development division provides youth with academic support, mentoring, counseling, and career guidance through a variety of programs. As part of Propel*Next*, RO was able to hire its first director of learning and evaluation who has been engaging program teams and conducting staff trainings, using fun and creative analogies and breaking the sessions into digestible parts.

The management team has put into practice a number of strategies to encourage a culture of inquiry at all levels of the organization. They are encouraging staff to think critically about the data they've been collecting and are working with staff to redesign surveys, streamline data collection and storage, and increase staff capacity for data use and learning. The executive director noted that "what we learned through Propel*Next* is going to absolutely transform the way we do things – it already has." Organizational leaders also acknowledge they have lots more to do and the strategic addition of a learning and evaluation director "has been pivotal" in helping to carry the work forward.

Adaptive Leadership and Managing Change

Organizational leaders play a critical role in shaping organizational culture, modeling learning practices, and infusing data-driven decision making across the organization. The Propel*Next* program provides coaching and guidance to support leaders as they adapt and lead during times of change. As the saying goes, change is constant, and California grantees weathered a broad range of internal and external changes ranging from staff turnover and lost funding to mergers and catastrophic wildfires. Along the way, leaders worked to inspire a culture of learning and high standards. In this section we highlight practices, behaviors and examples of progress in the following areas:

- Inspiring a culture of inquiry and learning
- Practicing shared leadership and strengthening the leadership team
- Building muscle to navigate change (change management)
- Modeling a reflective practice and data-driven decision making
- Engaging the board in learning and data-driven decision making

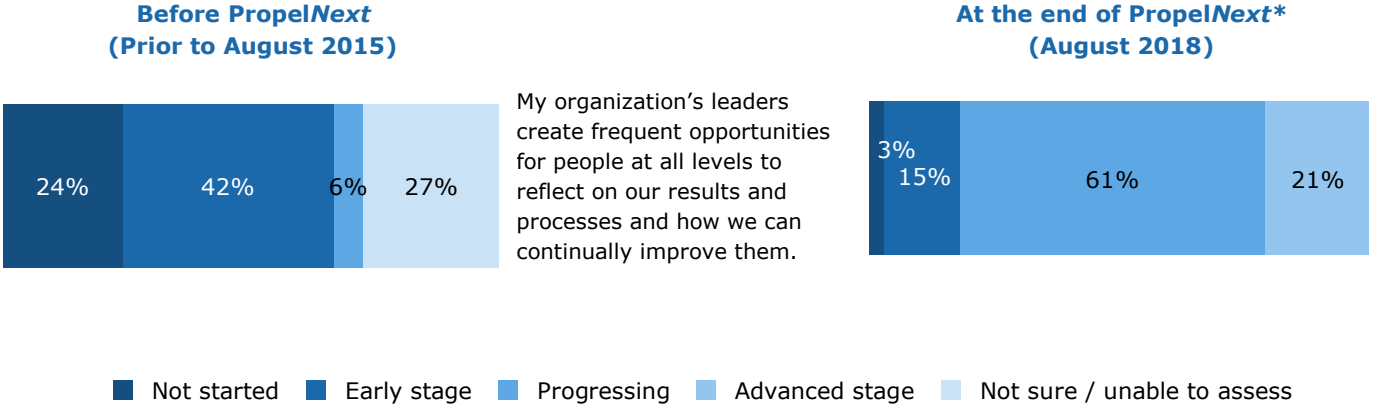
"We are all navigating lots of change. That was definitely the theme for executive directors."

– Leader

Inspiring a culture of inquiry and learning

Through their engagement in the test-and-learn cycle, leaders become increasingly aware of the need to adapt their leadership approach to manage both the anxiety and excitement that change often brings. Leaders have been encouraging curiosity by creating more space and opportunities to engage staff at all levels in reflecting on results and discussing approaches to continuous improvement. Prior to Propel*Next*, 66 percent of leaders said they had not implemented or were in the early stage of implementing this practice. By the end of Propel*Next*, 82 percent said they were progressing (61%) or in advanced stage (21%) (see Exhibit 7). This trend mirrors the same progression observed with the National 2015 Cohort, where 86 percent indicated the practice was substantially or fully in place two years post program.

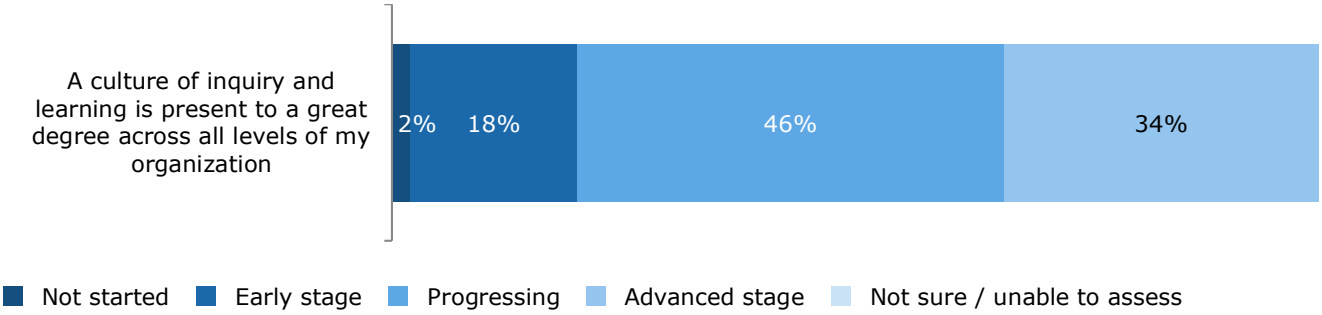
Exhibit 7: Leadership is increasingly creating opportunities for reflection (n=33)



*"Not started" value is not labeled – it represents 3%.

When staff were asked whether a culture of inquiry was present across all levels of the organization, most said the organization was making progress (46%) or in an advanced stage of implementing this practice (34%) (see Exhibit 8). This data point is consistent with the trend reported by management teams, providing further evidence that a culture shift is beginning to take root.

Exhibit 8: Staff perceptions on the extent to which a culture of learning is present across the organization* (n=44)



*"Not started" value is not labeled – it represents 3%.

Nonetheless, executive leaders and middle managers acknowledge that most of this work has taken place at the leadership and management level and has yet to fully trickle down to all frontline staff. Staff interviews and observations of team meetings reinforced that it takes considerable time and intention to extend and cultivate the culture shift across the organization. The post-program study of the National 2015 Cohort also suggests that these efforts begin to more fully permeate the organization in the years following Propel*Next*. Leaders of the California 2018 Cohort appear to be motivated and fully aware of the long-term nature of this process. To better understand the extent to which a learning orientation is permeating the organization, we asked program staff their perspective on what it means to be a learning organization. A thematic summary of their responses is highlighted in the textbox below.

Staff Reflections on Being a Learning Organization

As part of focus groups with frontline staff, participants were asked to share their definition of a learning organization. Key themes and reflections are summarized below.

Cultivating Staff: "A learning organization is an organization that cultivates people...it grows people."

Curiosity: "A learning organization approaches things with curiosity, and there's a piece of vulnerability that goes into knowing that you actually don't know [the answers]."

Continuous improvement: "If we review the data information for a program and it turns out that maybe we're not making a huge difference...I look at it as an opportunity to continue to learn."

Intentionality: "To me, a learning organization is an organization that leverages information that they collect, whether it be quantitative or qualitative, and responds to that information [by making decisions] to improve their programing and better provide services."

Open to change: "What I think is really great about being a learning organization is that we can change and shift."

Strengthening and practicing shared leadership

As organizations grow and strive to improve overall performance, the need to distribute leadership and strengthen leadership teams becomes more critical. In the context of Propel*Next*, this has involved actively engaging the executive team (executive directors and programmatic/operational directors) in Propel*Next* content as a way to cultivate shared ownership and responsibility for spreading a data-driven learning culture. A number of grantees have created new positions (such as deputy directors) or integrated new members into their leadership teams. A recent article in the *Nonprofit Quarterly* underscored the importance of shared leadership, particularly as organizations seek to shift practices and mindsets. "Shared leadership requires that staff be willing to see the big picture and take ownership for the whole organization. An executive director cannot decree this orientation; nor can it take root without senior leadership. […] If shared leadership does not become a broadly shared orientation, not much change is possible."[9]

Upon completion of the final year, leadership reflected on the many ways they've been building their orientation for shared leadership. In some cases, this has led to friction among senior leaders as they navigate their relationships, roles, and responsibilities in a changing environment. It hasn't always been easy; and as one program director noted, "I come from the program management side and there's the CEO perspective. Although these conversations have been uncomfortable, we have as an organization moved forward. It has helped us a great deal."

An executive director appreciated the opportunity to really dig into the program model with her deputy director. "One of the greatest tools that Propel*Next* gave us was this program model and at the same time, we were really strengthening our leadership team…We have the communications and fund development manager, the finance manager, as well as the program manager [all] leaning-in and giving their feedback and asking questions and being curious."

"It is very much a change management initiative. You really have to factor in the people side of change. We spent a lot of time in Propel*Next* focusing on the more technical side - like the systems, the processes, all of that - but not so much on stakeholder management."

- Leader

Navigating change

According to organizational leaders, Propel*Next* is fundamentally about transformation, calling for sharper skills and the agility to effectively navigate both the challenges and opportunities change brings. One executive director acknowledged, "Change management is very complex and we're all completely under-trained. It's happening all the time, so it seems like an area where we could have done a lot more work [in Propel*Next*]." Nearly all organizational leaders concurred and suggested more emphasis on change management throughout the Propel*Next* program. EMCF has already taken that feedback and applied it with the Northern California 2021 Cohort which launched in the fall of 2018. But even then, some leaders recognize that the content doesn't really hit home until you're in the midst of change. One noted, "During Propel*Next*, I was absorbing [the content] about change management, but it hadn't quite hit me. Now I feel it's really hitting me and I wish I was back in a room with all those program managers and directors talking it through."

Grantees have been grappling with change on many fronts including staff turnover, leadership transitions, mergers, loss of important contracts, and a myriad of other external changes for which they have little control. Internally, staff turnover and managing staff anxiety about new practices and expectations rise to the top of the list. Several leaders reflected on the importance of continuous and effective

[9] Allison, M., Misra, S., Perry, E. (June 25, 2018). Doing More with More: Putting Shared Leadership into Practice. *Nonprofit Quarterly*. https://nonprofitquarterly.org/2018/06/25/doing-more-with-more-putting-shared-leadership-into-practice/

communications. An executive director explained how some staff "felt like analyzing numbers was going to take away from the magic they do with youth." Others feared data would be used to assess their performance and they'd be penalized. One leader realized that "communication had to come from me and had to be reinforced over and over again….. [I had to] communicate the purpose of why we're doing what we're doing and connect it back to the mission. That really wore down people's resistance and fear."

"I really push EDs to bring in others in decision making…and they were surprised at how well that went."

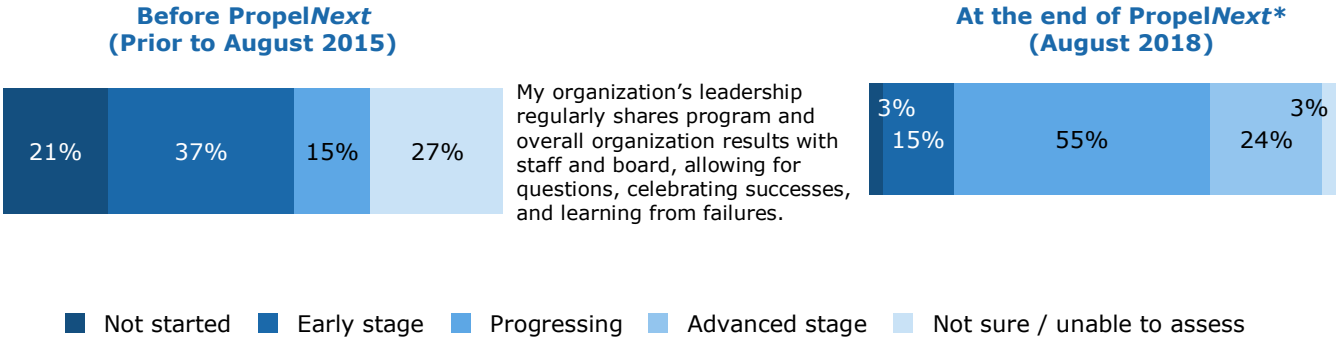
— Coach

Modeling a reflective practice and data-driven decision making

As discussed earlier, organizational leaders play a critical role modeling a reflective practice and inspiring a culture that encourages learning and continuous improvement. Interviews and survey results all indicate that leaders have increased the frequency and regularity in which they share data and results with staff and board members. This includes creating space and conditions to both celebrate successes and learn from experiences that didn't go as planned.

At the beginning of Propel*Next*, most organizational leaders (85%) were unable to assess, had not started, or were in the early stages of regularly sharing program and organizational results with the staff and board. Three years later, there was a notable shift, with 79 percent of leaders indicating they were making progress or in an advanced stage of implementing this practice (see Exhibit 9). Responses at the organization level revealed a slightly slower pace of progress at the end of Propel*Next,* with 11 of the 14 agencies saying they are progressing with this practice, one in the advanced stage, and two at the early stage (see Appendix D).

Exhibit 9: Leadership regularly shares results with staff and board (n=33)



Acknowledging and learning from failure is another important practice that sparks reflection and continuous improvement. When organizational leaders were surveyed, only 12 percent acknowledged the ability to cite a specific example of a "failure" that sparked reflection, analysis, and improvement prior to Propel*Next*. By the end of Propel*Next*, 79 percent said they were either progressing (52%) or in an advanced stage (27%) of implementing that practice.

Propel*Next* also seeks to help organizational leaders become more disciplined in their decision making by using data and evidence to improve effectiveness and overall organizational performance. This often includes using data to make tough and sometimes unpopular decisions to cut or eliminate ineffective or redundant programs. Before starting Propel*Next*, grantees were hard-pressed to cite examples of making such cuts. Twenty-one percent of leaders said they were either progressing or in an advanced stage of implementing that practice compared to 67 percent of leaders at the completion of the program. Staff were also asked whether they had witnessed or heard of specific cases of reductions or cuts by the end of Propel*Next*. Approximately 78 percent said they could cite examples of leaders making those types of decisions. The picture is even rosier at the organization level

with 12 of the 14 organizations saying they are progressing at this, and one each is at the advanced stage or still at the early stage of this practice.

Engaging the board in learning and data use

At the beginning of Propel*Next*, most organizational leaders (90%) acknowledged their boards were not actively reviewing and using data to inform discussions and strategic decisions. Throughout Propel*Next*, organizational leaders shared some of their challenges around board engagement and data use. Most pointed to issues of timing, readiness, and the availability of data as primary factors for lagging board engagement. Many leadership teams emphasized the need to first gain a strong grasp themselves before engaging the board and the rest of the organization in regular discussions about data.

Board engagement has been a common theme across the first two Propel*Next* cohorts; but even for organizations with data savvy boards, garnering their support and managing their expectations can be a challenge. One leader recalled, "I had a board president when I was applying for Propel*Next*, who came out of the aerospace industry. He was all about metrics. […] but then he was really disappointed that I didn't immediately have outcome metrics three months after starting Propel*Next*." Similar to staff engagement, creating a culture of inquiry and data use at the board level also takes time and intentionality. For most Propel*Next* grantees, this has necessitated a careful review of their board composition and whether they have the right talent on their boards to take them to the next level of performance.

While board engagement is still in an early phase of development, grantees are cultivating board champions and structuring board meetings in ways that support deeper discussions about data and results. Many have also started presenting demographic data and progress indicators to the board to inform discussions and decision making. By the end of the Propel*Next*, 58 percent of leaders said they were progressing or in an advanced stage of implementing this practice, compared to 9 percent at the beginning of the program. While board engagement may be a lagging indicator, this suggests grantees are indeed making progress in this area. Results from the survey of the National 2015 Cohort suggest a similar trajectory.

Organizational Spotlights

Navigating change and creating space for reflection

Silicon Valley Children's Fund (SVCF) helps young people in foster care with educational and career supports. Based in San Jose, SVCF recently merged with TeenForce to become Pivotal. They provide young people scholarships, tutoring, internships, job placements, and their own Pivotal coach. They guide young participants as they navigate the critical years from high school to college and into the workforce by helping them build skills and confidence to determine their own path.

Since starting Propel*Next*, SVCF has experienced substantial change, and organizational leaders said the Propel*Next* content on managing change was highly relevant and timely. Propel*Next* helped to shape and influence how they've structured and streamlined the organization post-merger. They recalled a Propel*Next* learning session on business planning that used the analogy of building or remodeling a home. "We saw that picture and it was clear to me that we were getting out of all those rooms and going to an open floor plan," a senior leader shared. "It all started to make sense." They immediately knew they needed to remove the "walls" that siloed their programs and integrate the team across departments. Like other grantees, SVCF leaders talked about breaking down siloes and "removing the walls" so they could reimagine and redesign their organizational structure following the merger.

Another key achievement has been building a dedicated data and learning team. Since starting Propel*Next* and their recent merger, they've created three full-time positions to facilitate strategic learning and data use. They are excited about the potential to take learning and data use to new heights and have instituted regular coaching labs where frontline staff come together to discuss data, problem-solve, and identify new and emerging questions.

Community Youth Center San Francisco (CYCSF) was founded in 1970 by community and youth leaders to create space for at-risk youth in San Francisco's Chinatown. Today CYC provides comprehensive youth development through education, employment training, advocacy, and other support services. Known as a pioneer in providing linguistically and culturally appropriate services, CYC serves over 5,000 low-income and high-need Asian Pacific American, Latino/a and African American youth each year.

Like most of the Propel*Next* grantees, CYC has been building its infrastructure and managing organization growth during the last few years. Through Propel*Next*, CYC has received support and relevant content on change management and models to position the organization for its next stage of growth. "They gave me different perspectives for running the organization," noted the executive director who has been with the organization for over 20 years. "I am very eager to know and learn about the pros and cons of other models and approaches. [This experience] has given me some different perspectives." Many members of the CYC team have "grown up" with the organization; and despite the openness to new ideas, navigating change can be uncomfortable at times. "It's a slow process," another leader reflected, and while staff are generally open to new thinking, changing practices takes time and intentionality. "The resources and tools we now have available to us create a strong foundation for all our programs," one leader shared, and "we are now looking at things with a more critical lens and not just accepting the status quo."

Talent Development

Nonprofit organizations are successful - or not - because of their people, yet the sector has overlooked this important truth for years.[10] Throughout Propel*Next,* talent management has been a central theme as organizational leaders introduce new practices, expectations, and performance standards. Not all staff have been willing and able to make the shift and some grantees have experienced significant turnover at various levels of the organization. While disruptive, many leaders recognize the opportunity to realign positions and rethink their approach to recruiting, cultivating, and managing talent. In this section, we highlight both the challenges and bright spots as grantees navigate change and align their talent with the mission they aim to achieve. Key themes, practices, and proof points include:

- Navigating staff turnover and transitions
- Getting the right people in the right seats
- Engaging staff and inspiring curiosity
- Communicating new expectations and standards of excellence

Navigating staff turnover and transitions

Turnover in the nonprofit sector is common, but a number of grantees believe at least some of the departures were a result of their efforts to transform their organizational practices and culture. For organizations with long-time staff, the change process has been slow and painful at times. "Many of our managers have literally [grown up] with the organization," a deputy director reflected, "trying new things … sometimes there may be some resistance. Change is slow and when you try to push too hard, it's painful." Organizational leaders are using transitions as an opportunity to make structural changes, refine job responsibilities, change recruitment practices, and strengthen their approach to staff development.

Several grantees have been reexamining their staffing structure and adding management positions to better support their evolving organization. Several organizations have or plan to add operations directors and/or human resources directors to better support talent management. Similar to the National 2015 Cohort, the California 2018 Cohort appears to be on the same trajectory as it translates staff turnover into opportunities to strengthen their bench.

Getting the right people in the right seats

In his book *Good to Great*, Jim Collins underscored the critical importance of human capital and coined the now famous phrase, "getting the right people in the right seats." Throughout Propel*Next*, grantees reflected on opportunities to develop and align their current staff, as well as identify areas that required new talent to propel them to the next level. At the beginning of the program, the concept of talent alignment was not really on the radar for most organizational leaders and the vast majority (94%) either weren't sure or were in very early stages of "getting the right people in the right seats." Propel*Next* created greater awareness about what it means both conceptually and in practice to align individual strengthens and skills with the appropriate responsibilities and expectations. Despite – or perhaps because of – staff turnover, 82 percent of organizational leaders felt they had made strong progress in this area (see Exhibit 10). One leader explained, "To have

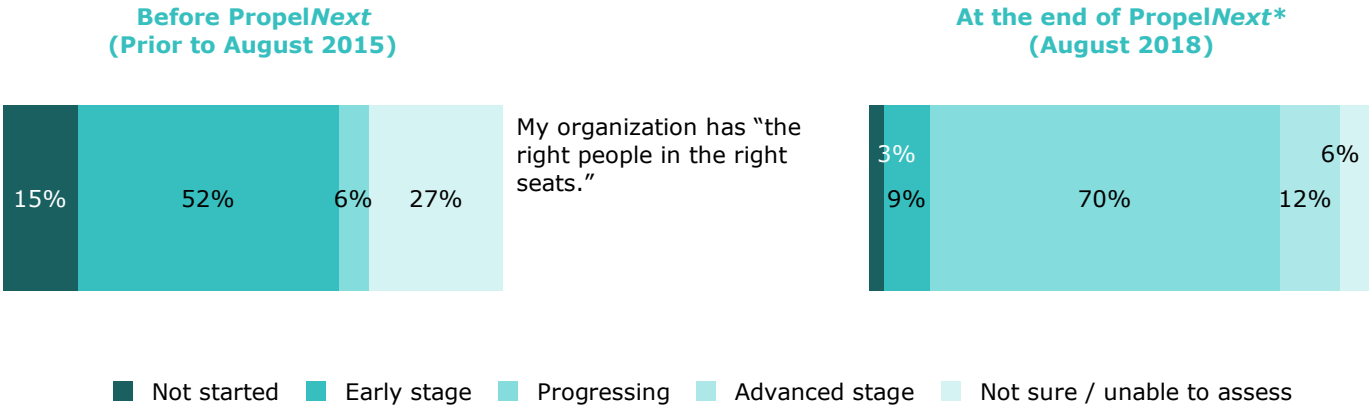
"It all ties back to having the right people in the right seats, but also making sure those seats hold the right mix of duties and responsibilities to support [the organization's] future growth."

- Leader

[10] Talent Matters https://ssir.org/talent_matters.

the right people to carry this without just being dependent on a few…our intention's definitely there and we do want to spread the secret sauce with all of our programs, but having the capacity is my biggest concern."

Exhibit 10: Leaders are confident they have the "right people in the right seats" (n=33)



*"Not started" value is not labeled – represents 3%.

Engaging and empowering staff

Employee engagement has long been regarded as a key success factor of thriving organizations and is particularly critical for organizations navigating change. "People are much less likely to resist the change when they've had a hand in shaping it," noted Diane Gherson, chief human resources officer at IBM in a 2018 interview for the Harvard Business Review.[11] Throughout Propel*Next*, organizational leaders received content and supports to help strengthen the engagement of staff across the organization in testing, learning, and continuous improvement. While most organizations are still in the early stages of deepening this practice, leaders have a heightened appreciation for staff ownership and engagement.

[11] Burrell, L. (2018). Co-Creating the Employee Experience: A Conversation with Diane Gherson, IBM's Head of HR. Harvard Business Review March-April 2018.

As noted earlier in the report, grantees that engaged more staff in the program model and theory of change development, reported positive results and a greater sense of buy-in. A number of leaders were pleasantly surprised by the level of interest among staff to use and discuss data. Many expected more resistance and those who more actively engaged staff in discussion said the engagement helped to inspire curiosity. As an additional measure of engagement, leaders were asked whether they could cite examples of making changes based on feedback from frontline staff. Survey results revealed a marked shift in the number of leaders who recognized the importance of engaging staff and acting upon their feedback. Prior to starting Propel*Next*, slightly over half (55 percent) said they were progressing or in an advanced stage of implementing the practice compared to 88 percent at the end of Propel*Next*.

"Leadership is very good at communicating expectations and challenging me… the way that they do it is in a very encouraging way."

— Staff Member

Communicating expectations and standards of excellence

As organizations articulate new standards of excellence, leaders and supervisors need to clarify and communicate new performance expectations. Upon completion of Propel*Next*, most grantees are still in the early phase of this evolving process but clearly recognize the importance of communicating expectations and strengthening their evaluations of staff performance. At least one organization has already begun to incorporate data into their performance review process as an opportunity to clarify expectations and promote continuous improvement. "[We are] using the data to better analyze performance," the executive director noted. "It's now incorporated into performance evaluation, staff evaluations, assessments of complaints and that's a whole new level that I didn't even anticipate when we started this process."

Both leaders and staff mentioned one-on-one weekly and/or monthly supervision check-ins as the main mechanism for communicating expectations and providing feedback. Results from the survey (see Exhibit 11) suggest a clear shift, with nearly 80 percent of leaders indicating managers are progressing or in an advanced stage of consistently communicating expectations and accountability, compared to 9 percent at the beginning of Propel*Next*. When asked the same question, the majority of staff (57%) felt their organizations were progressing with the implementation of this practice, and 21 percent said their organizations were in an advanced stage of implementation.

Exhibit 11: Managers are improving how they communicate standards of excellence (n=33)

*"Advanced stage" value is not labeled – it represents 3%.

When surveyed about the quality of supervision at their agency, most staff respondents said their organizations were making good progress (35%) or in an advanced stage of implementation (37%) of providing "responsive supervision, useful and timely feedback, and opportunities for staff development." Their responses about the regularity of performance reviews that define strengths and areas for improvement rated slightly lower than the responses about the quality of supervision, suggesting more work is needed to strengthen and align performance reviews with new standards and expectations. Approximately 45 percent said their organization was making progress and 29 percent said they were in an advanced stage of implementing this practice.

Organizational Spotlights

Implementing inclusive recruitment and development

Founded in 1968, the **Los Angeles Brotherhood Crusade (LABC)** works to improve the quality of life and meeting the needs of low-income, underserved, under-represented, and disenfranchised individuals. The services they provide focus on health and wellness, academic success, personal, social and economic growth, access to artistic excellence and cultural awareness, financial literacy, and building community agencies and institutions. The Brotherhood Crusade has enhanced their approach to talent management since participating in Propel*Next*. First of all, the Executive Director is now involved in the final stages of every hire. Youth are also involved in the hiring process for the programs they participate in, and leadership weighs 25 percent of their decision based on feedback from the young people. This approach "allows youth to have a voice, but it's also preparing them for the future to where they may be sitting across the table and learning how to evaluate someone that they might be working with." The Brotherhood Crusade team is also working hard to ensure the professional development needs of staff are being addressed. Based on feedback from staff, they have ramped up the number and types of training opportunities (e.g., trauma-informed training) available to their teams.

Enhanced recruitment process

LYRIC was founded in 1988 in San Francisco and is one of the first and largest LGBTQQ youth centers in the country. LYRIC provides education enhancement, career trainings, health promotion, and leadership development with lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQQ) youth, their families, and allies. Since Propel*Next* started, LYRIC has transformed their recruitment process. A leader from the National 2015 Cohort shared something that resonated with the LYRIC team. They said, "As you step into Propel*Next* and your level of what you're trying to achieve gets more clear, you will get more clear in who you're hiring to do that work because this person will get you there and this person will not get you there." To this end, candidates now complete a written questionnaire first, then an in-person interview, followed by a more traditional behavioral interview, and finally a role play interview.

Given the high level of trauma in the community they work with, leadership explained how identifying people who are "in a place in their life to be able to do this work is really challenging." The team at LYRIC has found that despite a candidate's level of enthusiasm and commitment to the work, the role play exercise is pivotal in making their final hiring decision. "You do a role play and someone is sitting there just unable to speak and you're just in a role play with three staff members. You don't even have a young person who's in a crisis situation," said one leader. A staff development opportunity has emerged as they have included this new step into their interviewing process. Leaders have been "coaching our staff to identify when it's not working and have the courage and authority to say as a member of our management team interviewing people, that is not someone that we can hire to do this work."

Engaging and empowering staff

Founded in 1988, My Friend's Place (MFP) offers comprehensive care that combines emergency necessities with therapeutic, health, employment and education assistance, and creative arts services. Their three programmatic areas are: Safe Haven Program, Transformative Education Program, and Health and Well Being Program. The most compelling evidence of MFP's responsiveness is through examples provided by staff of times when their input has been solicited and acted upon by leadership. As one staff member stated, "Every person here has opportunity. All management have an open-door policy, 'Come bring me your ideas, how can we fix things, how can we make them better?' It doesn't mean that every single thing happens, but there's space for everybody's input." Another staff member explained, "There's not a lot of struggle when it comes to giving your thoughts and opinions or adding changes…They've been taken seriously and I believe they've been incorporated when possible." In addition to an open-door policy, leadership have standing monthly meetings where staff can join to work on policy-related changes and process improvements. One staff member recounted, "Last month the focus was on how we can strengthen our policy for when we call 911 and the reasons we would do that and how would we implement it? Any staff were welcome to join that group and be part of that decision making...95% of staff were there." Staff representing a variety of positions at the organization shared similar stories, a testament to the responsiveness of MFP's empowering leadership and commitment to continuous improvement.

Organizational Integration and Alignment

While the initial focus of Propel*Next* is on program design and implementation, this learning-by-doing process creates fertile ground for a culture of continuous improvement across the entire organization. Upon completion of Propel*Next*, California grantees are at varying stages of this journey. Some have successfully extended the framework to other programs and others are still refining their systems and working to extend practices across the organization.

Overall, most grantees are still navigating the "groan zone" of organizational change; but based on findings from the post-program study of the National 2015 Cohort, the California 2018 Cohort appears to be on a similar trajectory. Most organizations from the National 2015 Cohort noted significant and ongoing change in the two years post-Propel*Next*. In this section, we highlight the themes and practice improvements for the California 2018 Cohort at the three-year mark related to organizational integration and alignment:

- Fostering collaboration and shared learning across departments
- Using data to inform operational, programmatic, and strategic decisions
- Integrating the theory of change framework into the organization's DNA

Fostering collaboration and shared learning across departments

To help infuse and spread data-driven learning across the organization, leaders have stressed transparency and communicating the value of learning and continuous improvement across often fragmented programs and departments. This is still a work in progress, but several grantees shared examples and promising strategies to foster shared learning and greater collaboration.

According to one executive director, "Propel*Next* revealed gaps and weakness that have been under the surface for a long time – not just about data but about how we work together and coordinate." Propel*Next* surfaced places in their continuum of services where youth fall through the cracks and created opportunities to be more youth-centric. Another grantee has created an organizational data and learning team that brings together program managers to discuss data and develop a shared learning agenda. "We pull the data [from the system] and then we break into groups. Each group is led by a program manager and we ask a few key questions – Are we doing what we say we're doing? How can we improve? What changes do we need? We ask each member of the team based on the data we presented." This simple but consistently used set of questions has helped to cultivate a more collaborative learning environment focused on continuous improvement.

Using data to inform operational, programmatic and strategic decisions

Organizational leaders shared how data and learning is shaping their approach to strategic planning and operational decision making. One director expressed excitement about efforts to align their talent, leverage their full team, and catalyze board engagement around their new strategic plan. "For the first time the conversations are more evaluative", and staff and board are asking "How are we assessing programming? How do we communicate that to our external stakeholders?" Learning and evaluation has become one of the core goals in their

"We've made shifts to our program model as a result of either looking at data or team meetings – [asking questions] like what is and isn't working? What do we need to do? We haven't remained static through this process."

- Leader

"For me [the most significant change from Propel*Next*] has been working across departments and making changes in my own department, in my program, based on feedback from staff in other programs."

- Program Manager

new strategic plan. With help from their coach, they have also infused an awareness of what it costs to recruit new talent, build more robust systems, and perform at a higher level.

The practice of looking at the research as part of program design has also extended to other areas of the organization. Organizational leaders reported a substantial shift in using data to inform all types of organizational decisions, rather than relying on intuition alone. Prior to Propel*Next*, most leaders (70%) acknowledged they simply did not implement or were in an early stage of implementing this practice, and 24 percent were unsure or unable to assess. That shifted quite dramatically by the end of Propel*Next*, with 94 percent either progressing or in an advanced stage of using data to make decisions. When surveyed, staff largely concurred, with 70 percent saying their organization was progressing (52%) or in an advanced stage (18%) (see Exhibit 12).

Exhibit 12: Managers are more readily using data to inform decisions (n=33)

*"Not started" and "Early stage" are not labeled – both represent 3%.

Integrating the theory of change framework into the organization's DNA

Most grantees have begun the process of extending the program model design and theory of change to other programs and areas of the organization. These efforts have been supported by cross-departmental learning that seeks to reduce the silos across programs and engage staff in collaborative learning. This has also helped to spread new practices and frameworks in ways that generate deeper buy-in and collaboration.

Prior to Propel*Next*, the majority of grantees did not regularly engage in the process of using theories of change to guide their programming or overall organization. Post-Propel*Next*, 75 percent of leaders said they are progressing (67%) or in an advanced stage of integrating a theory of change framework into their organizational DNA. Responses from middle managers and staff further corroborated this trend with 77 percent saying their organizations are progressing (68%) or in an advanced stage (9%) of implementing this practice (see Exhibit 13). When rolled up to the organization level, however, progress looks more optimistic, with 13 of the 14 organizations stating that they are progressing and one is in the early stage of this practice.

"From leadership, the executive director down, it's been pretty transformative for them, impacting the culture of the organization, reshaping how they think about staff."

— Co-investor

Exhibit 13: Most organizations have integrated their theory of change into their organizational DNA (n=33)

*"Progressing" value is not labeled under "Prior" and "Not sure/unable to assess value" is not labeled under "Now" –both represent 3%.

As evidenced by the findings from the National 2015 Cohort study, integrating a theory of change approach across the organization takes time. Two years-post program, 17 percent of organizations (compared to 9% of the California 2018 Cohort) were at an advanced stage with the goal of integrating the TOC, and 53 percent had substantially met it. Nonetheless, the California 2018 Cohort is making progress by creating and cultivating key positions to help bridge and navigate across programs and departments. As one leader explained, "We really need somebody who can focus on making sure all the programs are aligned", which is critical to integrating and embedding this work into the organizational DNA.

Organizational Spotlights

Shifting from compliance to shared learning

Asian Youth Center (AYC) is a community-based organization that seeks to empower low-income, immigrant, and at-risk youth to overcome barriers to success through culturally and linguistically appropriate education, employment, and social services. Based in the San Gabriel Valley (Los Angeles area), AYC served over 1,900 youth last year. Having a centralized and functional data system has been a game changer for AYC. As an organization with lots of government contracts, they've been collecting data for compliance and reporting purposes, but it wasn't being used for learning, program improvement, or assessing impact. While they are still in the early stages of building the capacity of frontline staff, the leadership is using data to drive conversations with staff about program improvements and to explore promising practices that can be spread across the organization.

Unlike other grantees who have created senior-level learning and evaluation positions, AYC has taken a different route, starting with a data analyst position at a non-supervisory level. The current analyst is also a case worker who understands the programmatic side and is helping peers acclimate to the new data system. AYC is working to cultivate internal talent by bringing together program managers on a regular basis to discuss data and promote a more youth-centered approach. According to program managers, these meetings have helped facilitate cross-program learning and referrals, as well as shift how people work across departments and teams. Prior to Propel*Next*, AYC was a siloed and compliance-driven organization. According to the executive director, one of the biggest achievements has been "moving staff into a space where they engaged in data collection and analysis. Getting over their fear and developing that sense of curiosity has really been guided by what we learned from Propel*Next*. I don't know that we could've gotten there without that."

Fostering youth-centric programming through collaboration

Social Advocates for Youth (SAY) is based in Santa Rosa, California, and provides vulnerable and at-risk youth with stable and safe housing, job readiness training and work opportunities, and mental health services. SAY leaders and staff have considerable experience managing crisis and navigating change. During their final year of Propel*Next*, they demonstrated their resilience after a devastating wildfire affected their community and placed new stain on the organization and staff. Through it all, SAY has been unrelenting in its pursuit of continuous improvement.

According to organizational leaders, Propel*Next* has created opportunities to strengthen the continuum of supports for the young people they serve. "I've worked here a really long time, and thought we worked well together," one leader shared, but the Propel*Next* process and ongoing data discussions helped reveal gaps and areas for improvement. They realized coordination across programs was fragmented and young people were left to navigate the "muddy waters." Ever since, they've been breaking down silos and strengthening collaboration across their services lines – a process they called out as one of the most significant gains from Propel*Next*. They are now working collectively to ensure their organization is "youth-centered" rather than "program driven."

Based in Alameda County, **Beyond Emancipation (B:E)** uses an innovative coaching approach to provide safe and stable housing, education supports, employment preparation, and other services to help foster and probation youth successfully transition to adulthood. B:E has become known for crisis-informed and relationship-based coaching models, as well as cohort-based coaching that create space for clients to develop relationships with peers.

Propel*Next* provided an opportunity to strengthen their program models and align their multi-service approach into a more robust continuum of supports. "We did a reorganization of our program structure very much inspired by Propel*Next,*" noted an organizational leader, and began "to move towards an organization wide theory of change. We have historically been organized in these programs silos and starting this fiscal year we've flipped that to be organized more as pathways." B:E is able to work with youth over a ten-year span of time, and their new structure and intentional focus on pathways is helping them break down programmatic silos and be more client-centric. "That was a big piece of work, driven by what we've learned from Propel*Next* and by wanting to have sounder, clear outcomes that are not only driven by contractual requirements, but by what we want to do for young people."

Sustainability and Extending the Work

Propel*Next* is not a financial capacity-building program, but the focus on performance management and quality improvement has positive and reverberating implications for other aspects of the organization. It also has cost implications in terms of talent and infrastructure development. This section highlights key themes related to financial health and sustainability, as well as ways grantees are strengthening relationships with funders, strategic partners, and external stakeholders. We also summarize challenges grantees anticipate on the road ahead. Evidence of progress and key themes include:

- Retaining and attracting new sources of funding
- Strengthening relationships and credibility with other funders

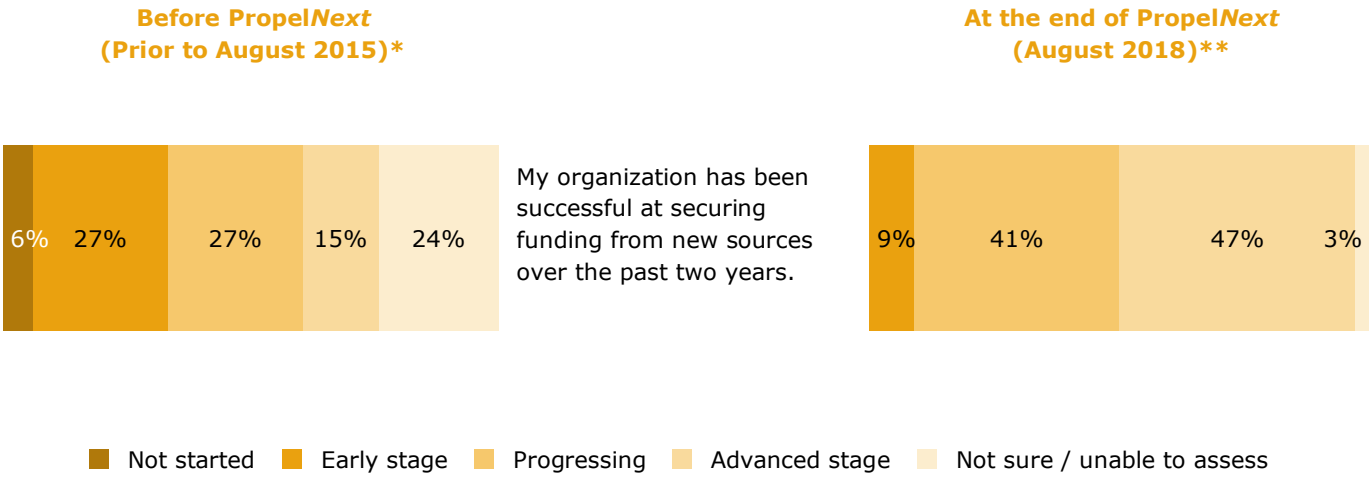
"We're not exactly where we would love to be to attract the Kelloggs and the Fords, but we have the language to attract new people to our work."

– Leader

Retaining and attracting new sources of funding

Not surprisingly, financial sustainability is top of mind for the vast majority of organizations, especially with the increased focus on learning, quality, and talent development. As shown in Exhibit 14, 47 percent of the organizations are at an advanced stage of successfully bringing in funding from new sources (compared to 15% pre-Propel*Next*) and 41 percent are progressing (compared to 27% pre-Propel*Next*). This suggests that grantees are, in general, experiencing some success attracting funding from new sources.

Exhibit 14. The vast majority of organizations have made progress in securing new funding (n=33)



*Total does not equal to 100% due to rounding.

**"Unable to assess" value is not labled – it represents 3%.

Survey results reveal grantees are experiencing success retaining existing funding. At the end of Propel*Next*, 55 percent of leaders indicated advance success in this domain, compared to 27 percent at the start of the program. Fund development and financial health look different for each grantee. In the last two years of

Propel*Next*, one organization went from $200,000 in reserves to $1 million. Another organization has seen the investment in their pilot program grow over the three years. "We self-funded and scrapped that together initially and then we got some grant money to support it in the second year. Now we've secured funding for the next 5 years." As a result of strong financial health over the last few years, another organization was able to extend their line of credit, hire additional development staff, and invest more in their growth and expansion.

Strengthening relationships and credibility with other funders

Grantees and co-investors reported their relationships have strengthened as a result of Propel*Next*. One co-investor said, "There's a certain level of transparency, vulnerability, honesty, and candor that develops when you're in this type of process. The funder-grantee dynamic can be a little bit canned or threatened with the power dynamic, that just shifts when you're in this process together. The grantees that I speak with have a lot more ability to tell me what's going wrong in addition to what's going right." In some cases, the relationship is continuing post-Propel*Next*. Another co-investor explained how they are continuing to provide unrestricted support to their Propel*Next* grantees because they recognize "the real concern for most of them is how they are going to be able to sustain these specific positions given some of the infrastructure changes."

The connection to Propel*Next* has also opened doors to new opportunities. One leader described how one of the co-investors conducted a site visit and "it allowed us to have a really authentic and valued conversation […]. I maintained that over this past year, and we were able to get a very special project funded and we are also now being considered for an entirely different funding [opportunity]." Another organization was able to "leverage [the Propel*Next*] experience" with another funder to secure a $300,000 grant to bring a senior-level evaluation and learning staff member on board.

The California 2018 Cohort is grappling with the same issues as the previous cohort in terms of the real cost of operating at a higher level and staying competitive when bidding for contracts. One co-investor referred to this as "the cliff" noting "a lot of these organizations meet the challenge of being a lot more sophisticated than they were coming in and now they need to start attracting different funders." According to one executive director, "One of the concerns that I had was the cost of data collection was driving up our cost of unit of service and might make us non-competitive when we're applying for [funding]…We found that two out of probably 20 contracts we've bid on over the last three years, we didn't receive because our bid was too high."

One leader called on philanthropy to reconsider their expectations. It is a "hard social challenge that we're facing. It's not straightforward. It's not pull-up by your bootstraps. It's not some curriculum or some formula. Non-profits need to stop apologizing for how expensive it is and stop apologizing for the fact that we're trying to help government build a better system. But we're not going to help move the needle without using the information and learning about our direct practice" and that is expensive. The co-investors recognize this and one said, "If you really want to see an organization move from point A to point B and actually see organizational change, it takes a significant investment."

The framing around the cost of high-quality programming is critical when trying to attract and retain funding, but both grantees and co-investors recognize the need to build more awareness in the funding community. Grantees are eager to strengthen their communications about impact and outcomes. Co-investors recognize that "their outcomes are a lot more certain and driven in fact rather than

talk about dealing with [issues like healing from trauma, institutional racism, and poverty] and not just putting lipstick on a pig, [programmatic work] is expensive! You're either going to pay for it now or way more dollars down the line as a community."

- Executive Director

"Having known this organization from the very early stages, [Propel*Next*] has had such a dramatic effect on them. You really see it in both their language and practices."

- Co-investor

communication fluff." The reality is that "there are lots of funders that say they want data but the data that they want is really surface level and we have a lot of organizations who are claiming these really great outcomes and yet there's no there, there," explained one co-investor.

Grantees also see opportunities to go beyond their own microcosm and contribute to systems change and field building. "It's not always about more funding," one leader shared. "It's about how systems do their work with our youth too. As a training and a learning organization we need to help spread that out there." One co-investor observed grantees making strides in their communications with external stakeholders, and remarked that they "have infused both the language and practice of Propel*Next*… they have lived, breathed, and articulated it in practice and in describing their work not just with us, but publicly in their presentation materials." Most grantees see external communications as the next frontier and are looking forward to having robust data to tell a compelling story of impact.

Grantees feel they are "far more competitive", but they just need the entrée to meet with other funders. "The challenge with the open-door process is you can't just go knocking. We're in the Land of Oz now, but we can't get into the castle to meet the wizard. And so [Propel*Next* funders] need to make the appointment so that we can get in." The co-investors acknowledge their role in making these connections. One co-investor suggested they should be going out "to tell the grantees' stories" and finding ways to help them gain more visibility, whether "it's taking them on the conference route or more writing [articles] in The Chronicle of Philanthropy, Stanford Social Innovation Review, or wherever else."

"You realize what they're really up against in being able to sustain this work within their organizations and how few funders are willing to support this…the field really hasn't shifted in valuing this work or wanting to invest in this area. We still have a long way to go."

– Co-investor

Organizational Spotlights

Using data to tell a more compelling story

For more the 50 years, **Huckleberry Youth Programs (HYP)** has been serving at-risk youth in San Francisco and Marin County. They seek to empower young people to develop and maintain healthy relationships as well as assist youth and their families overcome adversities such as drug and alcohol abuse, mental health issues, teen pregnancy, violence, sexual abuse, and social and economic inequalities. Using an innovative coaching model, they help clients navigate complex social welfare, educational, and juvenile justice systems.

Since starting Propel*Next*, HYP has been working to leverage their data system and embed data inquiry practices into their organizational culture. At times, they've struggled to get data out of the system in ways that promote inquiry and data use; but despite the logistical challenges, HYP leaders see the power and potential of data for internal use and bolstering systems change efforts. "We've always been ahead of the curve a bit in recognizing that data is important, it tells a story, and it helps to guide funding decisions."

As part of their work with other systems partners, they frequently share data and what they are learning to inform systems coordination and service delivery. "Since Propel*Next*, it has helped us to keep thinking about how to tell the story about our clients and the work we do, and why it's worth funding," a senior leader reflected. "It's about how systems do their work with our youth too […] it is advocacy to impact policy decisions." Initially HYP funded the Propel*Next* pilot program – Project READY, a juvenile justice diversion program for middle school youth – by scrapping together funds internally; but with data in hand and a compelling story to tell, HYP has secured enough external funding to support the new program for the next five years.

Key Takeaways and Future Considerations

Propel*Next* is a comprehensive and highly coordinated initiative that strives to create a sense of community and a strong peer-based learning experience. As a cohort model, grantees receive the same content and capacity-building supports from a dedicated team throughout the three-year initiative. To better understand the secret sauce of Propel*Next*, the evaluation team regularly gathered information and feedback from grantees, coaches, and funders throughout the program. Across the board, grantees appreciated the "boot camp" approach, challenging them in ways that had not been challenged before. The combination of intensive supports is part of what makes Propel*Next* a powerful program; but according to the California 2018 Cohort, the most critical components have been the high-caliber coaching and the peer-learning approach.

While grantees value the fiscal support, the structure and technical support make Propel*Next* stand apart from other capacity-building initiatives. As one executive director put it, in the past "we've gotten money, but there's no training connected to it. It's hard to implement and move forward when we don't know what we're doing. Without the technical coaching, it would've been really horrible and possibly misspent. I think that combination is just incredibly effective. It's revolutionary." In this section, we highlight grantee reflections on what makes Propel*Next* a transformative program and the specific facilitators and program components that have been most impactful in propelling organizations forward.

Key Facilitators and Supports

Customized organizational coaching is a game changer

Similar to the National 2015 Cohort, the California 2018 Cohort consistently ranked expert coaching as the most valuable aspect of Propel*Next*. They valued the balance of rigor and accountability, as well as the honest candor, thought partnership, and tailored approach to meet the unique needs and context of each organization. It goes without saying that effective coaching is built upon trusting relationships between coaches and grantees, which continued to evolve during the three-year program. Earlier in the program, several grantees expressed reservations about being completely open with coaches and some felt their coaches didn't fully understand their organizational dynamics or the intricacies of their programs. By year three, grantees were far more likely to praise their coaches and engage in deep and constructive conversations. Specific "standout" aspects of the coaching include:

- **Structure, rigor, and accountability**: Grantees valued the structure and accountability that kept them on track and pushed them forward. One organizational leader appreciated the balance between rigor and learning, noting coaches promoted high standards but also "modeled what they were trying to teach us. It was a safe environment and that was really important in terms of being able to take risks, being able to say

Recommendations

- **Managing change:** Given the complex and dynamic nature of managing change, the appetite for content and support on change management is high and should be woven throughout the Propel*Next* program.
- **Refresher workshops**: Given staff turnover, grantees said they would benefit from Propel*Next* webinars or workshops to introduce key new staff to performance management tools and approach.
- **Community of practice**: Senior leaders and directors of learning and evaluation are eager to connect with their counterparts and learn from each other. In addition to the Online Learning Community, a quarterly or semi-annual virtual meeting could help facilitate and strengthen a Propel*Next* community of practice during and after Propel*Next*.
- **Group leadership coaching**: Several grantees are planning to pool their resources for more small group coaching support. In addition to sharing the cost burden, this approach has the potential to strengthen the peer support network.

something that maybe wasn't spot on. Because everyone knew that it was okay."

- **Fresh perspective and tailored support**: According to one executive director, "[Our coach's] partnership and capacity to dive in deeply with us was just extraordinary." When asked about the attributes of an effective coach, grantees pointed to their ability to provide support and encouragement, assess gaps and inconsistencies, provide new insights, and challenge their thinking and assumptions. One director reflected on how their coach provided much needed perspective and support when things felt overwhelming by saying, "We had a pretty pivotal coaching session where [our coach reminded us], we got to start somewhere to get to where we want to be."

- **Candor and hard truths**: One grantee pointed to the usefulness of "radical candor", and another appreciated hearing the "hard truth" that pushed them in uncomfortable but productive ways." It also appears that, over time, and as grantees developed more trusting relationships with their coaches, they were more likely to share their vulnerabilities and engage in these types of crucial conversations.

Grantees are fully aware that they're on the cusp of organizational transformation and the journey is far from over. "The biggest inherent challenge [post Propel*Next*]," said one grantee, "is not having that external person pushing you and the loss of the coaching and learning sessions." Another said, "I would love to have [our coach] for another couple of years to help us figure things out. Now that we know more about what we don't know, I think we could approach it much more thoughtfully." Most said they'll look for ways to sustain the coaching support, even if it requires tapping their own resources. A cluster of organizations in the Bay Area have already discussed pooling their resources to invest in additional group coaching sessions post Propel*Next*. In addition to coaching support, this approach provides the added benefit of fostering shared learning and collaboration.

"There's no substitute for having somebody regularly checking in…and who's willing to push you outside of your comfort zone. There's been a few other [capacity-building] programs that I've been part of where there's been some component of that, but it hasn't been nearly as comprehensive or as in depth as what is provided with Propel*Next.*

-Executive Director

The cohort-based, peer-learning model contributes to deep learning, collaboration, and field building

The cohort-based model has created a strong sense of community, both within and across cohorts. Over time, grantees developed trusting, transparent, and supportive relationships, as well as a shared language and experience. According to one California 2018 grantee, "Overall what we found to be the most beneficial was the peer learning, both from our current peer group as well as the first cohort." As grantees completed the final year of the program, several key insights emerged about the key facilitators and value of the cohort-based model.

- **Organizational leaders seek peer support and guidance as specific needs arise**: Executive directors, in particular, shared specific examples of reaching out to colleagues in both cohorts at different points in time to seek advice, support, and guidance. One director said she'd benefitted from peer support from another CEO on organizational challenges and also established a partnership with a third grantee to replicate their youth curriculum and coaching model. Other leaders (e.g., deputy directors, evaluation staff, etc.) said they would benefit from more peer-to-peer opportunities both during and post Propel*Next*, while acknowledging that efforts to build those relationships were often hampered by staff turnover.

"Peer support is what maintained my sanity. I really appreciated the peer breakouts where I was just with my peers [from other organizations]."

-Executive Director

- **Regional clusters provide opportunities for deeper engagement, collaboration, and local impact:** Co-investors, coaches, and grantees cited the multiple benefits of regional clusters, including bringing more resources to the area and strengthening the capacity and network of youth-serving organizations. Grantees said they were most likely to connect with organizations in their geographic region or with organizations that had similar program models. According to one director, geography plays an important role "because you see these people around town at events and you're all part of this crew." He also noted a strong desire to support peer organizations from sharing information about fundraising events to providing on site tours and support for grant applications. Contrary to initial concerns about regional competitiveness for grants and resources, most grantees said Propel*Next* has helped deepen their partnerships with counterparts in their respective regions. "We had a relationship [with another grantee] before but not nearly to the level it is today," an executive director from Southern California shared.

- **Cohort-based model creates strong sense of community and collective commitment to field building:** The level of collaboration and willingness to openly share information with other grantees has proved to be quite extraordinary among and between both cohorts. Several grantees in Northern California have shared specific examples of partnering on grants, joining forces to advocate for policy and systems change, and strengthening support and referral networks for their clients. According to one grantee, "We've partnered with [another grantee] and they send overflow youth here when they're out of room or have a special case like a sex trafficking victim that needs to be in a new environment." This partnership emerged from a conversation about housing and service assets at a large group learning session.

"This last year was a pretty significant change process for our entire organization and we focused on leadership and board…We got valuable coaching and instruction on those pieces. Of all three years, this last year was most valuable to me as an executive director."

-Executive Director

Results and Key Takeaways

Propel*Next* is designed to help nonprofits accelerate change and propel them to a higher level of performance. "We're just starting on a journey [and] there's this beacon up ahead that you're seeing where to go," said a senior leader. In many ways, Propel*Next* has prepared grantee organizations for the journey, with the knowledge, skills, and practices to weather the unpredictable conditions along the way. Below, we briefly summarize key capacities that organizations are incubating and putting into practice.

- **Well-designed and well-implemented programs and strategies:** Grantee organizations are developing research-informed program models and making data-informed improvements to program models. They have gained clarity, confidence, and skills designing, testing, and implementing programs with fidelity. At the end of Propel*Next*, data use practices have permeated the leadership and management level; but for most organizations, those practices have not yet trickled down to frontline staff.

- **Systems, infrastructure, and capacity to support data use:** Grantees have been implementing and refining data systems to systematically collect and use data. While some have had technical challenges, the vast majority said having a centralized system has been a significant achievement. They also are building their human capacity to train staff to use data for continuous improvement. Most grantees now have at least one or more full-time staff dedicated to data and strategic learning.

- **Adaptive leadership and capacity to manage change:** Organizational leaders are highly reflective, modeling data use practices, and inspiring a learning culture. They are also strengthening their leadership teams and engaging their boards in strategic learning and data use. Navigating change has been, and continues to be, top of mind; but leaders have gained new skills and insights for managing both challenges and opportunities.

- **Talent management aligned with organizational needs and performance goals:** Several organizations have been restructuring their organizations, creating new positions, and assessing talent needs to more effectively align with their mission and performance goals. Some organizations have experienced signficant staff turnover, which, while challenging, has created opportunities to recruit staff with new skills sets. They are working to clarify new performance expectations and are implementing creative strategies to engage and energize staff.

- **Intentional efforts to align and integrate learning and data-driven decision making across organization:** Grantees are initiating cross-department and cross-program teams to discuss and interpret data, leading to more collaboration and youth-centric programming. Several organizations said increased collaboration and breaking down silos has been one of the biggest achievements from Propel*Next* thus far.

- **Efforts to sustain momentum through fund development, partnerships, and stronger communications:** Sustainabilty continues to be top of mind, and grantees expressed concerns about the increased costs associated with the infrastructure and talent needed to improve quality and raise the bar. At the same time, some have been able to attract funding from new sources and believe this work has increased their profile and credibility. Several also noted instances and opportunities to strengthen relationships with funders and to influence the funding community.

"I've participated in other capacity-building [programs] with other funders, but this felt like they were really truly invested in us. We could be vulnerable…we could leave all [those concerns] at the door, and just dive into the messiness."

– Leader

Concluding Remarks

For most grantees, the end of the program has been bittersweet. Grantees expressed gratitude for the depth, rigor, and collaborative spirit with which the funders and consulting team delivered the content and support. "The process in general, as hard as it was at times, was transformative," an executive director shared. "We're a completely different organization three years later." Propel*Next* has provided a solid foundation and has helped to propel organizations into a new space. While they acknowledge the road ahead will likely be full of bumps and detours, they have acquired new knowledge, skills, and capabilities to weather the ride. As one leader put it, "This isn't something that comes to an end. This is the beginning of what lies ahead."

Appendices

Appendix A: Propel*Next* Theory of Change

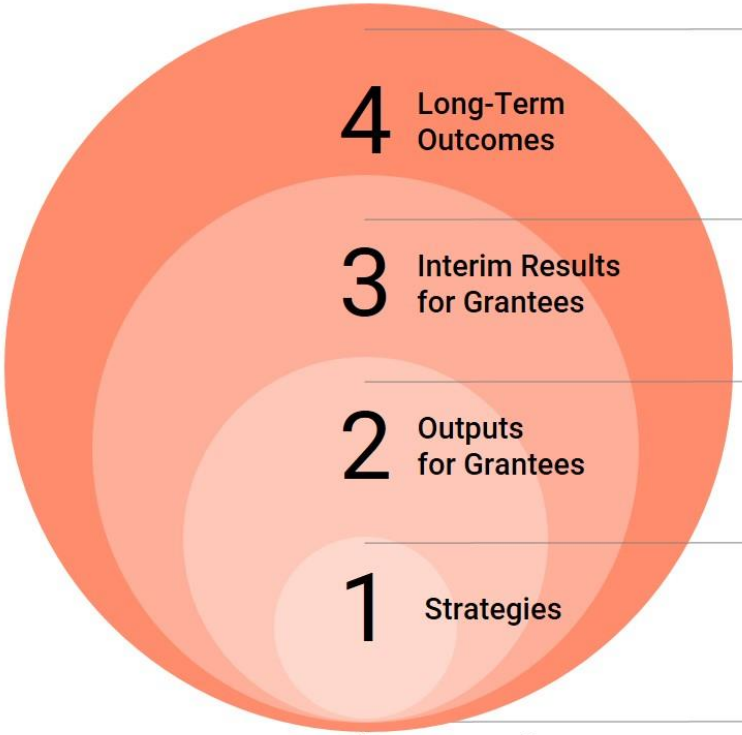
propel*next*

an initiative of the
Edna McConnell Clark Foundation

Theory of Change

Our goal is to propel promising nonprofits to make a greater impact on the lives of America's disadvantaged youth.

We accomplish this by helping nonprofits strengthen their youth program design and implementation and use of data for learning and improvement.



+ Impact

Many more disadvantaged youth are able to transform their futures thanks to even smarter, stronger organizations with the mastery to collect, use and apply data for ongoing cycles of improvement, learning and evaluation

4 Long-Term Outcomes

- More youth organizations use data to generate insights that inform their work
- Organizations are stronger, capable of delivering better results and more prepared for evaluation; this increases potential for funding and expansion
- There is greater understanding of the most effective and efficient ways to build nonprofits' capacity to use data for learning and ongoing improvement

3 Interim Results for Grantees

- Program models are aligned with theories of change
- Program models are followed more rigorously
- Staff and leadership across the organization use data to drive strategy and performance
- New knowledge informs other programs

2 Outputs for Grantees

- Program models and theories of change that are grounded in evidence
- Talent and practices to support data analysis and regular review of data

1 Strategies

- Grants
- Peer Network
- Customized, expert coaching
- Group learning sessions
- Online learning community
- Knowledge sharing and support

Λ Nonprofits We Target

Youth organizations with promising programs, strong leadership and a drive to excel through learning

Appendix B: The Propel*Next* Model

In 2012, the Edna McConnell Clark Foundation (EMCF) launched Propel*Next,* an integrated three-year program that provides unrestricted funding, peer learning, individualized coaching, and technical assistance to help a cohort of promising nonprofit organizations adopt a data-driven approach to their work with at-risk youth. Propel*Next* is intended to support organizations whose programs are not yet fully codified to help strengthen their capacity to use data for learning and ongoing improvement. EMCF joined forces with the William and Flora Hewlett, the David and Lucile Packard, the Sobrato Family, and the Weingart Foundations in 2015 to launch a second cohort of grantees based in California. In Fall 2018, a third cohort of organizations began their journey supported by the following foundations: William and Flora Hewlett, David and Lucile Packard, Sobrato Family, Heising-Simons, and Edna McConnell Clark.

While many funders offer capacity-building grants, Propel*Next* stands apart because of its focus on improving performance management and building a results-driven culture, coupled with a substantial investment in time, support, and resources. Not only do the funders make a considerable investment in supporting the grantees, but participating in the program necessitates a notable time commitment from grantee staff as well. Throughout the three-year program, several key leaders and staff across grantee organizations from the California 2018 Cohort participated in Propel*Next*-related activities, including learning and coaching sessions. The program's intensive combination of supports (i.e., unrestricted grants, individualized coaching, group learning opportunities, and data system work) is part of what makes Propel*Next* a powerful program. Detailed below are the comprehensive supports that the California 2018 Cohort received from 2015-2018:[12]

Unrestricted Grants: The California 2018 Cohort received unrestricted grants over three years, totaling $400,000. These grants provided organizations and their leaders the flexibility to direct resources where needed and the time and space to take on the work of Propel*Next*.

Individualized Coaching: Propel*Next* grantees received guidance from best-in-class coaches who brought expertise, analytical skills, and structured support to each organization. Grantees received customized one-on-one coaching that responded to their unique needs for the duration of the three-year program.

Group Learning Sessions and Small Group Coaching Workshops: The California 2018 Cohort participated in a total of 9 large group in-person learning sessions over three years. During these multi-day gatherings, grantees learned from external experts, focused on skill building, and engaged in a community of practice with their peers. In between the group learning sessions, grantees gathered in-person for half-day workshops with a smaller group to apply learning, problem-solve, and share work with coaches and peers.

Online Learning Community: An online community was developed to better support Propel*Next* leaders and organizations in between in-person gatherings. The OLC platform provided an online space for EMCF, coaches, and organizations to share learnings throughout the duration of the program.

Performance Management Systems: Grantees received funding and training to implement state-of-the-art performance management systems. Through these systems, grantees gained the ability not only to track the right performance data, but also to convert that data into actionable information to support tactical and strategic decision making.

[12] Building on lessons learned from the first two cohorts, refinements have been made to program structure, content, and delivery for the Northern California 2021 Cohort.

Appendix C: Methodological Framework

Evaluation Framework and Areas of Inquiry

Harder+Company Community Research and Engage R+D conducted a three-year developmental evaluation of the effectiveness of the Propel*Next* initiative on organizational capacity of the California 2018 Cohort to use data for learning, self-evaluation, and ongoing organizational improvement. The evaluation was organized into three learning cycles, with the primary goal of assessing (1) the implementation of the Propel*Next* model and (2) the process of building a learning organization. The following overarching research questions informed the evaluation:

1. **How are grantees progressing through the Propel*Next* Program?**
    - What successes and challenges do grantees face as they move through the various components of the program?
    - Does the content presented to grantees give them the foundational knowledge and tools needed to be successful in subsequent phases of the work?
    - What have been the biggest organizational shifts?

2. **What facilitates or supports grantees' progress in the Propel*Next* program? What hinders grantees' progress?**
    - Which learning strategies are most critical to grantee success and which seem to be less helpful?
    - What lessons have been used to inform the design and delivery of learning strategies?
    - How are grantees connecting with others in the cohort? What are the best ways to leverage peer learning?

3. **How and to what extent are grantees infusing Propel*Next* learnings and practices into their organizations?**
    - How are grantees translating and integrating their program-level work into organizational-level change?
    - What has been most challenging and what have been early benefits of working towards organizational-level change?
    - To what extent are grantees invested in cultivating talent, training, and resources to instill learning and data-driven decision making into organizational culture?
    - How are grantees engaging others in their organizations and infusing new knowledge and practices into their agencies?
    - How are grantees communicating this work internally and building buy-in at different levels?
    - How and at what point could grantees be better supported in the process of shifting organizational culture?

The evaluation team actively engaged EMCF, the Propel*Next* consulting team, and key advisors in designing and implementing a study to meet the goals and address the questions outlined above. The planning for the final report benefitted from an iterative process that incorporated the perspectives and expertise of multiple stakeholders and built off data collected and lessons learned in years one and two.

Methods

To answer the research questions during all three years of the evaluation, a multimodal methods framework informed both the data collection and the analytic

approach. This first round of data collection took place from spring through fall of 2016 and included interviews with coaches and grantees, document/data review, in addition to observations of Propel*Next* learning sessions and coaching workshops throughout the first year of the cohort.

The second round of data collection took place in the summer and fall of 2017 and included interviews with grantee leadership and staff, as well as interviews with co-investor foundations and Propel*Next* coaches, surveys of grantee staff, and continued observation of learning sessions and coaching workshops.

The third and final round of data collection took place in the summer and fall of 2018 and included a retrospective assessment completed by grantee leadership, a retrospective survey completed by grantee staff, in-person site visits to all grantees (involving interviews with leadership, focus groups with staff, and observation of data/evaluation team meetings), interviews with co-investor foundations and Propel*Next* coaches, development and analysis of a youth progress indicators and outcomes inventory, and continued observation of learning sessions and coaching workshops. Each round is captured and described in more detail below.

Propel*Next* California Evaluation: Data Sources and Methods

Data Sources and Methods						
	Grantee Leadership	**Grantee Staff**	**Co-investors**	**Coaches and Consultants**	**Documents and Program Data**	**Group Meeting Observation**
Year 1	Interview Site visit			Interview	Review and analysis	Observe and document
Year 2	Interview	Interview Survey	Interview	Interview		Observe and document
Year 3	Retrospective assessment Interview Site visit	Retrospective assessment Interview Site visit	Interview	Interview	Review and analysis	Observe and document

First Round of Data Collection (January–December 2016)

- **Phone and in-person interviews with coaches and consultants:** We conducted nine interviews with coaches and consultants. The purpose of these

conversations was to understand coach and consultant perspectives on how grantees were grasping the Propel*Next* content, which learning strategies had been most effective, progress grantees were making towards their target milestones and challenges they had faced, organizational characteristics and support grantee success, and how grantees were beginning to infuse Propel*Next* learnings and practices into their organizations. In addition, we asked for feedback on the extent to which coaches felt supported in their role, areas in which they could be better supported, what they felt was most effective about the Propel*Next* model, and their suggestions for further strengthening the initiative.

- **In-person interviews with organizational executive leaders:** We conducted in-person (and one phone) interviews with 35 executive directors and executive team members from 15 grantee organizations. The majority of interviews were one-on-one, with one organizational leadership team interviewed as a group. The purpose of these interviews was to explore grantee perceptions of the content, sequencing, and pace of the first year of Propel*Next*, experiences with and recommendations for strengthening each individual learning strategy, and progress towards their target milestones. The conversations also included discussions of how grantees were beginning to make shifts at the organizational level through building or strengthening a learning culture, engaging internal staff and board members, and encouraging youth to provide program feedback.

- **Document and data review:** We systematically reviewed select documents and reports, including the grantees' theory of change and data reports, annual coaching progress reports, and grantee performance milestones and self-assessments to help inform the evaluation framework and learnings. In addition, we reviewed and analyzed data from the Propel*Next* Online Learning Community to understand how and when grantees were utilizing the OLC, their level of engagement, alignment of usage with initiative-related events or deadlines, and most common searches.

- **Observation of group learning sessions and small group coaching workshops:** We attended the series of in-person convenings, including the 2.5-day learning sessions in January, May, and September and the coaching workshops in December.

Second Round of Data Collection (January–December 2017)

- **Phone interviews with organizational executive leaders:** We conducted phone group interviews with 44 executive directors and executive team members from 15 grantee organizations. The purpose of these interviews was to explore grantee perceptions of the content, sequencing, and pace of the second year of Propel*Next* and experiences with and recommendations for strengthening each individual learning strategy. The conversations also included discussion of grantee progress towards their target milestones, lessons learned through implementing their program pilot, the institutionalization of data inquiry practices throughout the organization, and the biggest organizational shift they have seen since the start of the initiative. In addition, grantees were asked how they were engaging others both within (e.g., staff and board members) and outside (e.g., funders and partners) their organization in their learning, as well as youth involved in their program. Lastly, grantees were asked to look ahead and share what they believed would be their biggest organizational challenge post-Propel*Next*, how they were planning for the future, and how they might be expanding their program pilot.

- **Phone interviews with key program staff:** We conducted phone (and one in-person) group interviews with 40 staff from 15 grantee organizations. The purpose of these interviews was to understand to what extent staff had been involved in the Propel*Next* work and their familiarity and engagement with their organizational theory of change and pilot program model developed through Propel*Next.* The conversations also included lessons learned through implementing their program pilot, how staff were engaging with data and being supported by leadership to do so, and how Propel*Next* was influencing the way their organization carried out their work. Lastly, staff were also asked how organizational leaders and managers were sharing back their learning from Propel*Next*, providing opportunities for staff to share their ideas and strengthen their skills, and communicate expectations and provide feedback.

- **Staff survey:** In advance of their group interviews, we administered a five-question online survey completed by 35 staff from 14 grantee organizations[13]. The survey gathered data on staff involvement with the Propel*Next* work, their frequency of engaging in various data inquiry activities, and their confidence in completing such activities. Information from the survey helped frame the group conversations and provided additional background on staff engagement in the initiative.

- **Phone interviews with co-investor foundations:** We conducted phone interviews with five staff from four co-investor foundations. The purpose of these interviews was to understand foundations' motivations, goals, expectations, and satisfaction in their participation in Propel*Next*. The conversations also included key lessons learned about supporting capacity building for youth-serving organizations and comparisons between Propel*Next* and other capacity-building models. In addition, foundations were asked about their past and ongoing relationship with grantees, perceptions of grantee progress, and desired indicators of further progress post-Propel*Next*. Finally, foundations were asked how they would like to see grantees message their progress and new ways of working with funders and how foundations themselves share information about Propel*Next* with others in the funding community.

- **Phone and in-person interviews with coaches and consultants:** We conducted eight interviews with coaches and consultants. The purpose of these conversations was to understand coach and consultant perspectives on how grantees were grasping the Propel*Next* content in year two, which learning strategies had been most effective, and grantee progress with their program pilot and data practice and reporting. In addition, we asked what if anything was different about the year two experience for coaches and grantees, what evidence coaches were seeing that grantees were building their capacity for organizational learning, how grantees were engaging with peers in their cohort, how grantees were soliciting and utilizing youth feedback, and what organizational shifts coaches were seeing in their grantees. Lastly, we asked for feedback and suggestions on strengthening the coaching component and the Propel*Next* model as a whole.

- **Observation of group learning sessions and small group coaching workshops:** We attended the series of in-person convenings, including the 2.5-day learning sessions in January, May, and September and the coaching workshops in March.

[13] One organization did not continue with the program.

Third Round of Data Collection (January–November 2018)

- **Retrospective leadership assessment:** We created a structured and quantifiable assessment that built upon the Dimensions for Building a Learning Organization (DBLO) rubric with clear, specific evidence and progress indicators. The evaluation team leveraged a select number (26) of relevant "proof points" from the newly released PIOSA tool.[14] focusing on items that strongly aligned with DBLO and Propel*Next* program content. It is important to acknowledge that organizational assessments are not designed or intended for use as external evaluation tools. Nonetheless, they can be a useful means to better understand an organization's journey and progress when explored within the context of other internal and external factors.

  Assessment data were gathered using a retrospective format, included information from multiple perspectives, and asked core leaders (EDs, CEOS, directors of learning and evaluation, chief program officers, etc.) from each organization to complete the assessment. The assessment was administered online in advance of site visits, and the evaluation team sought to validate responses by asking probing questions and looking for tangible evidence during site visits. In total, we collected 33 assessments from leaders across each of the 14 grantee organizations.

- **Retrospective staff survey:** We administered a 33-question paper survey completed by 44 staff from 14 grantee organizations. The survey gathered data on staff involvement with the Propel*Next* work and their perceptions of program model development and implementation, data collection and use, data technology and infrastructure, organizational capacity for performance management, and organizational sustainability. All substantive questions asked staff to answer for two points in time – pre-Propel*Next* (prior to August 2015) and post-Propel*Next* (August 2018) – allowing for comparison in responses over time.

- **In-person site visits:** The evaluation team conducted site visits with 14 grantees after the conclusion of the Propel*Next* program. The in-depth site visit was designed to gather data on grantees' reflections on year three and the program as a whole. In addition to the staff surveys described above, site visits provided the evaluation team the opportunity to conduct interviews with leadership and focus groups with staff. During these group interviews and focus groups, conversations included content and sequencing of Propel*Next* topics, overall utility of the various learning strategies, connection and collaboration with peers in the cohort, the ongoing process of building a learning organization, engagement of youth voice, and planning for a sustainable future post-Propel*Next.* Lastly, site visits allowed for review of documents and data reports, the observation of discussions and meetings over data, and the assessment of regular practices in data inquiry and action.

- **Phone interviews with co-investor foundations:** We conducted phone interviews with four staff from four co-investor foundations. The purpose of these interviews was to understand foundations' perspectives on grantee progress and their past and ongoing engagement with their grantees. Co-investors were also asked for their ideas on how to encourage more conversations in the philanthropic sector about how funders can support nonprofits in the process of becoming learning organizations. Lastly, foundations were asked to reflect on the Propel*Next* model and possible variations to make it both effective and scalable, their own biggest learning from the three years of the cohort, and any changes in their philanthropic practice resulting from their

[14] See the Performance Imperative Organizational Self-Assessment http://leapambassadors.org/products/piosa/.

engagement with Propel*Next.*

- **Phone interviews with coaches and consultants:** We conducted six interviews with coaches and consultants. The purpose of these conversations was to understand coach and consultant perspectives on how grantees were grasping the Propel*Next* content in year three, grantees' progress implementing and refining their program pilot and extending program model and theory of change frameworks outside their pilot, and how grantees were soliciting and utilizing youth feedback. In addition, we asked for coaches to reflect on the evolution of grantees' data use and practice over the three years, what evidence coaches were seeing that grantees were building their capacity for organizational learning, what organizational shifts coaches were seeing in their grantees, and what they expected grantees' biggest challenges to be in two or three years. Lastly, we asked coaches to reflect on the evolution of their role over the course of the cohort and to look forward and recommend how EMCF could best leverage both the coaching role and peer learning among future Propel*Next* cohorts.

- **Development and analysis of a youth progress indicators and outcomes inventory:** We developed an inventory to organize and consolidate information collected across grantee organizations into a centralized space. We used data available in grantee year three data reports and coordinated with grantees to answer questions or provide additional context for information in those reports. We then built a framework to categorize and, where appropriate, further quantify the types of progress indicators (e.g., program attendance, academic advancement, work certification, etc.) and program outcomes (e.g., school graduation, enrollment in further training, completion of a work or internship opportunity, etc.). The purpose of this inventory was not to measure grantee progress on these indicators and outcomes, but to create and maintain an inventory of the type of data organizations collect to inform future work.

- **Observation of group learning sessions:** We attended in-person 2.5-day learning sessions in January and May.

Confidentiality Protocol

Permission was sought from all participants to record in-person and telephone interviews and focus groups. Recordings were transcribed by an online transcription service. Confidentiality was assured by establishing that participant names would neither be attributed to their responses nor shared with anyone outside of the evaluation team. All recordings and transcripts were saved on a password protected cloud server.

Analysis

- **Survey analysis:** Frequencies were conducted to examine response patterns and to discern the extent to which there were changes over time on several key indicators. Significance testing was not conducted, either because of small sample size or low valid responses on staff surveys in year two and on both leadership and staff retrospective surveys in year three. In year three, several staff and some leadership could not provide responses to questions assessing organizational capacity or practices prior to involvement with Propel*Next*.

- **Qualitative analysis:** Content analysis was used to identify key themes across interviews and focus groups. Transcripts were reviewed and coded in ATLAS.ti using a coding scheme developed by the evaluation team. Coded passages were reviewed again to identify emergent patterns and themes for each year.

Thematic summaries were developed to capture impressions from both meeting observations and site visits conducted in year three.

- **Coding framework and inter-rater reliability:** The evaluation team developed qualitative coding protocols by using interview and focus group scripts to inform the coding scheme and definitions. To establish inter-rater reliability, the evaluation team coded selected transcripts and then reviewed each selected transcript to seek agreement where there were discrepancies in the coding process.

Limitations

As with any study, there were a number of methodological and analytical limitations in this study. First, findings have been based on comparisons made among those that participated in the California 2018 Cohort of Propel*Next*, with some comparisons made with the National 2015 Cohort where possible and relevant. Second, that some of the staff members who participated in the cohort no longer remain at their respective organizations will have affected the depth and breadth of the information collected at some sites. Last, the Propel*Next* model is still evolving and adaptations have been made during cohort. Changes have been made to the sequencing, to individual components, and to the overall composition of the program with subsequent cohorts (i.e., data system work). Other key limitations are discussed below.

- **Retrospective surveys:** Given the lack of a source of baseline data, the evaluation team used a retrospective format to assess pre–post program change. Multiple leaders at each organization were each asked to complete the online survey instrument. Responses were self-reported and thus, subject to potential bias and differing interpretation. In addition, there may be a recollection bias, in that respondents may not be able to accurately recall conditions or circumstances several years prior. Several respondents, at both leadership and staff levels, were new to their respective organizations and could not assess organizational capacities or conditions prior to, or at the end of, the Propel*Next* program, resulting in a significant number of responses in the "unable to assess" category. Further, there is the consideration of a social desirability response bias in that respondents may be unconsciously motivated to provide responses that present their organization in a more positive light.

- **Focus groups:** Focus groups are a helpful way to understand complex or more nuanced contexts in a small group setting. Focus groups also represent a more cost-effective alternative to individual interviews. An important limitation to consider is that not all respondents may feel comfortable articulating views that diverge from the consensus or dominant view of the focus group. In addition, while efforts can be made to ensure that all participants have a chance to speak, there may be misrepresentation in shared knowledge as some participants may dominate the discussion.

- **Interviews:** Interviews are an ideal mode of data collection for obtaining more in-depth and detailed information from stakeholders. Because interviews are conducted one-on-one, there is less group influence as compared to focus groups; however, social desirability bias may still remain a consideration. Within individual interviews, there is also the opportunity to seek clarification and elaboration when answers seem incomplete. As well, interviews are not only costlier than surveys, the time needed to conduct, transcribe, and analyze interview data is also greater. In the coding of both

focus groups and interview data, there may be divergence in how pieces of information may be interpreted, coded, and summarized unless specific training and protocols are followed.

Appendix D: Analysis by Organization

As discussed Appendix C, the evaluation team administered two surveys with staff from the organizations that were part of the California 2018 Cohort. One survey targeted leadership at the 14 organizations (33 leaders responded) and the other targeted a range of program and frontline staff (44 staff responded). Some survey items were asked of both leaders and staff, while others were asked of just one group.

The report is centered on the participant-level data for a variety of reasons: 1) To allow for direct comparison to the previous evaluations of the California 2018 Cohort as well as the National 2015 Cohort; 2) To explore the similarities and differences between the responses of leaders and staff given their various levels of involvement in Propel*Next*; and 3) To capture a wider range of responses with larger sample sizes.

However, quantitative analysis was also conducted to explore the change and growth experienced at the organizational level since this is a key aim of Propel*Next*. For the most part, the results with the organization as the unit of analysis correspond to the results at the participant level, but any notable difference is reported in the main body of report. Examples of the corresponding results from the organizational-level analysis are included below.

For reference, the stages of development (which are used as scales in the items below) are defined as:

Not started: My organization has not started working on this.

Early stage: My organization has started working on this but has made little progress to date.

Progressing: My organization is making progress on this, but has more to do.

Advanced stage: My organization has made significant progress on this.

Not sure/Unable to assess: I do not have enough information to assess this or this does not apply to my organization

Program Model and Implementation

Exhibit 15: The majority of organizations have integrated their theory of change

My organization has integrated our theory of change into our program/organizational DNA – that is, everyone understands and can articulate our theory of change, and knows how to contribute to its execution.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	9	64%	0	0%
Early stage	5	36%	1	7%
Progressing	0	0%	13	93%

Advanced stage	0	0%	0	0%
Not sure/Unable to assess	0	0%	0	0%

Exhibit 16: Most organizations implement their programs based on codified program models

My organization's program teams implement our services based on codified program models that address: research/evidence, intended outputs and outcomes, phasing, dosage, and duration of activities.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	6	43%	0	0%
Early stage	8	57%	0	0%
Progressing	0	0%	13	93%
Advanced stage	0	0%	1	7%
Not sure/Unable to assess	0	0%	0	0%

Data and Technology

Exhibit 17: The majority of organizations reported that their data systems are helping to gauge program effectiveness

My organization's data system provides reports to help us gauge program effectiveness and drive improvements in all facets of our organization.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	6	43%	0	0%
Early stage	8	57%	1	7%
Progressing	0	0%	12	86%
Advanced stage	0	0%	1	7%
Not sure/Unable to assess	0	0%	0	0%

Exhibit 18: Most organizations are still in the early stages of establishing a team member to assess the utility of data collected

My organization has a staff member or a team of staff that periodically assess whether the information we collect, analyze, and use continues to have high value and relevance.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	9	64%	3	21%
Early stage	5	36%	8	57%
Progressing	0	0%	3	21%
Advanced stage	0	0%	0	0%
Not sure/Unable to assess	0	0%	0	0%

Organizational Capacity for Performance Management

Exhibit 19: Managers are more readily using data to inform decisions

My organization's managers regularly use qualitative and quantitative data to inform their operational, programmatic, and strategic decisions rather than relying on their intuition alone.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	3	21%	0	0%
Early stage	8	57%	2	14%
Progressing	3	21%	12	86%
Advanced stage	0	0%	0	0%
Not sure/Unable to assess	0	0%	0	0%

Exhibit 20: Leadership regularly shares results with staff and board

My organization's leadership regularly shares program and overall organization results with staff and board, allowing for questions, celebrating successes, and learning from failures.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	2	14%	0	0%
Early stage	9	64%	2	14%
Progressing	3	21%	11	79%
Advanced stage	0	0%	1	7%
Not sure/Unable to assess	0	0%	0	0%

Exhibit 21: Managers are improving how they communicate standards of excellence

My organization's managers communicate their standards of excellence by clearly defining what team members are accountable for and how and when their success will be assessed.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	3	21%	0	0%
Early stage	8	57%	1	7%
Progressing	3	21%	11	79%
Advanced stage	0	0%	2	14%
Not sure/Unable to assess	0	0%	0	0%

Exhibit 22: Leadership is increasingly creating opportunities for reflection

My organization's leaders create frequent opportunities for people at all levels to reflect on our results and processes and how we can continually improve them.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	2	14%	0	0%
Early stage	9	64%	1	7%
Progressing	3	21%	10	71%
Advanced stage	0	0%	3	21%
Not sure/Unable to assess	0	0%	0	0%

Sustainability

Exhibit 23: Most organizations are improving in their ability to cut back ineffective efforts

My organization can cite specific cases in which we have cut back or eliminated efforts we found to be ineffective, redundant, or unsustainable and/or redirected resources to areas of greater opportunity.

	Before Propel*Next* (Prior to August 2015)		At the end of Propel*Next* (August 2018)	
	N	%	N	%
Not started	2	14%	0	0%
Early stage	8	57%	1	7%
Progressing	3	21%	12	86%
Advanced stage	1	7%	1	7%
Not sure/Unable to assess	0	0%	0	0%

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