PropelNext Alumni Study
The Road to High Performance
June 2018
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As a member of the Edna McConnell Clark Foundation’s Evaluation Advisory Committee, I provided feedback on the design of the PropelNext Alumni Study. Now, with the study’s completion, I am excited to share encouraging evidence of the organizational impact of the PropelNext capacity-building model. As described in this report, PropelNext’s intensive program of organizational capacity building helped 12 grantees in the program’s first cohort develop cultures of results-based learning and evidence use, which in turn improved their organizational performance and growth. Through PropelNext, these organizations codified their program approaches to align with their theories of change, and they adopted management systems for collecting, analyzing, and using performance data to achieve program improvement and accountability. As grantees strengthened these core capacities, they also upgraded their capabilities in other areas, including human resources and fiscal management.

This study, which is intended to inform funders, nonprofit leaders, and capacity builders, demonstrates that well-designed interventions to increase organization-wide capacity and effectiveness can, if delivered with sufficient intensity and skill, help promising nonprofits reach high levels of focus, scale, and success in their efforts to assist targeted populations in achieving positive outcomes. The study is unique within the field of organizational development because of the comprehensiveness of the capacity-building approach it describes and the descriptive detail it offers to explain how PropelNext stimulated both evidence-based learning cultures and also organizational growth.

PropelNext’s capacity-building approach differs from traditional approaches because it focuses first on each organization’s mission and culture. In particular, it helps an organization develop and implement a program model informed by relevant research and the organization’s own performance data. This work can promote an organizational culture of learning, data use, and improvement. PropelNext also provides explicit assistance in designing, implementing, and using tools for performance management that each organization tailors to its own needs. Over time, PropelNext’s capacity-building support can extend to other organizational domains, including talent development, fiscal management, and sustainability.

In contrast to PropelNext’s approach, conventional capacity building tends either to target limited ranges of organizational functions or to align with a particular improvement pathway promoted by a funder. It may, for example, focus on fiscal management, the training of front-line staff, or the customization of tools for case management. While often helpful, such approaches seldom offer strategies and supports for transformational change. Similarly, studies of these interventions tend to measure change within narrow domains, without assessing broader shifts in an organization’s capacity to achieve its mission.

Important characteristics of this study’s research design and execution increase our confidence in its findings. In particular, the study collected data over time from many sources. Key informants included leaders and staff of participating nonprofits, board members, and funders. Evaluators collected data over two years, beginning in the first year after organizations completed the program and extending through their second year post-PropelNext. They supplemented these data with information about the organizations’ capacities prior to program participation, permitting analysis of differences before and after the intervention. Evaluators also conducted multiple targeted surveys during the data collection period, visited program sites, and conducted focus groups and individual interviews with organizations’ leaders.
and staff. In addition, they reviewed program indicators, data, and reports, and they observed program operations, including meetings to analyze and act on program data.

Collection of these data over two years enabled evaluators to assemble a multifaceted picture of each organization, its operations and leadership, and its changes over time. In addition to major shifts in organizational policies and practices, evaluators documented contextual factors affecting organizations’ operations, described in the embedded mini-case studies of grantees’ implementation of PropelNext principles and approaches. Examining organization-wide program models and strategies, evaluators assessed whether changes in policies and practices eventually permeated an entire organization, through mechanisms such as cross-departmental learning improvement teams and the shared adoption of data tools.

In addition to the quality of the research, a final set of three indicators help to confirm the validity of the study’s findings. First, the adoption and implementation of the program’s core principles were remarkably consistent across the 12 organizations. Second, the reports of positive organizational change were most compelling with respect to the principles at the center of the intervention, namely, those concerned with theories of change and aligned systems of performance management. We would expect this level of consistency if organization-specific change were being driven by a single external source, such as PropelNext. Third, the magnitude of change over time was large and confirmed by multiple measurement methods, suggesting they were likely to reflect actual conditions.

As I consider the findings summarized here and at the underlying research, I conclude that an intensive, data-informed approach to developing organizational capacity can transform the culture and practice of social-service nonprofits, if implemented with sufficient intensity and skill. Continuing high-quality capacity-building efforts will permit experimentation, refinement, and vital research in this field. This research can weigh, for example, the trade-offs between program cost and benefits, in order to guide attempts to improve program effectiveness within modest social-service budgets. Researchers can also experiment with data collection tools that increase data relevance and accuracy. Finally, researchers can undertake comparative studies to gauge the value added by intensive capacity-building support. Over time, these programs and studies of them are likely to yield new insights into how to deliver more effective supports to social-service organizations and improved services to people in need.

Elizabeth Reisner
Executive Summary

Background

PropelNext is a comprehensive, cohort-based, capacity-building program launched by the Edna McConnell Clark Foundation (EMCF) to enhance the effectiveness of promising nonprofits serving America’s disadvantaged youth. With a focus on high-quality programming, grantees participate in a structured three-year program that helps them build the knowledge, infrastructure, and practices they need to become data-driven learning organizations. EMCF believes that supporting organizations to use data will strengthen their programs and, ultimately, improve outcomes for youth.

The first national cohort completed PropelNext in 2015. To better understand the impact of the program, EMCF partnered with Harder+Company Community Research and Engage R+D to assess post-program progress, achievements, and challenges. The evaluation synthesized data from a multitude of sources and perspectives using mixed methods that included surveys, interviews, focus groups, site visits, and document review. The study unearthed promising evidence that alumni have embedded a learning culture and performance management practices deep into their organizational DNA. More than two years after completion, alumni organizations described their experience as transformational, with one CEO asserting, “You can’t go back to what you were before.”

While the initial focus of PropelNext was on data-informed program models, the work extended far beyond programming and has had profound implications for nearly every aspect of organizational performance. The practices learned during PropelNext were not “one and done” events but were part of a long-term journey to embed a culture of learning and continuous improvement across an organization. Two years after completing the program, the majority of organizations have sustained, deepened, and, in many cases, advanced performance-management capacities across a spectrum of areas. This executive summary and the full report highlight key results and insights about the challenges, facilitators, and nuances of building a learning organization.

Key Takeaways and Results

Alumni organizations are implementing data-driven programs with increased attention to quality and fidelity | Alumni organizations are delivering higher-quality programs with codified models that are based on research, clear target populations, intended outcomes, and program components with in-depth definition of dosage and duration. Organizations are also improving implementation fidelity by developing guidelines, engaging staff in data use, and providing more intensive supervision.

- **Institutionalizing codified program models and implementation fidelity**: Prior to PropelNext, organizational leaders acknowledged that their programming was often driven by intuition rather than evidence. Post-PropelNext, 91 percent of leaders indicated that their organizations use the best available data to develop and refine their programs. The majority of leaders (87 percent) said that their organizations had since created individual or team positions that were responsible for monitoring implementation fidelity, compared to 11 percent pre-PropelNext. Several alumni also changed the frequency and structure of program and staff meetings to improve program fidelity. Others have restructured supervision to become fidelity-driven,

“We always talked about having the head and the heart, but the heart led and then the head came along. [Now] we lead more with the head from a heart-centered place. That was a big shift.”

-Alumni leader
PropelNext Alumni Study Executive Summary

spending more hands-on time with frontline staff to discuss data before having conversations about what should happen next.

- **Expanding reach and serving more disadvantaged youth:** Ten out of 12 alumni organizations are now serving more youth, with a median growth of 53 percent. Organizations have also increased their program options and have begun to grow their programs through partnerships and expansion into additional geographic sites. One organization doubled their number of school partnerships, while another expanded programming to 13 new cities. Funders, board members, and partners cited expansion into new places and serving more youth as being among the most noteworthy alumni achievements over the last three to five years.

**Alumni organizations have more robust performance-management systems and data-use practices** | All 12 organizations are using more robust data systems and are giving frontline staff access to data to help strengthen program delivery. Staff members are increasing both their capacity and confidence to use data, as well as their ability to think critically about relevance and utility.

- **Building capacity to collect and use data:** Prior to PropelNext, seven of the 12 organizations did not have dedicated data and evaluation staff. Nearly two years after the program, 11 of the 12 have dedicated staff with an average team size of 2.3 full-time staff, compared to 0.5 full-time staff in 2012. Leaders indicated that, prior to PropelNext, frontline staff had limited or no access to data. Two years post-program, 78 percent of leaders indicated that frontline staff members use data on a daily basis to more effectively perform their work. A review of data reports that were generated both before and after PropelNext revealed notable improvements in utility, level of rigor, and ability to synthesize information across multiple sources.

- **Increasing confidence to use and interpret data:** More than two-thirds of staff reported feeling “very confident” or “completely confident” determining what data should be collected to improve programs and assess participant outcomes. Staff members are using data to monitor progress and make course corrections. As one staff member put it, “Data’s in almost everything we do.” During site visits, the evaluation team observed frontline staff thoughtfully presenting and analyzing data as well as troubleshooting, asking critical questions, and discussing actionable next steps.

**PropelNext has helped enhance the capacity of leaders to inspire a learning culture and commitment to high performance** | Alumni leaders are communicating a clear vision while modeling a learning culture through the systematic sharing of results and using of data to make operational and strategic decisions.

- **Modeling a learning culture:** Prior to PropelNext, the majority of leaders noted how sharing programs and organizational results with staff and board members was not a common practice. After PropelNext, 86 percent indicated that they regularly shared and discussed results. One director shared their frequent practice of pausing during discussions or staff meetings to say, “Why don’t we put this conversation on hold until we actually have the data.” Staff provided corroborating evidence, with 79 percent indicating how organizational leaders regularly share results and discuss goals. Observations and focus groups with staff provided additional evidence of how leaders encourage continuous improvement and curiosity.

“We have a way more defined program model than we did in the past . . . we know what we’re all working towards.”
-Alumni staff member
PropelNext Alumni Study Executive Summary

- **Making disciplined and data-driven decisions:** Prior to PropelNext, leaders found it difficult to cite specific cases where they cut back or eliminated efforts that were revealed to be ineffective or unsustainable. Two years after PropelNext, over 80 percent of leaders could cite specific examples where they had both the data and courage to make tough decisions. Interviews with board members revealed further evidence of more disciplined decision making. Examples included eliminating programs that were ineffective, making difficult staffing decisions, and reconsidering partnerships and funding opportunities that did not align with the organization’s mission and/or commitment to data, learning, and continuous quality improvement.

Alumni organizations are strategically investing in talent and aligning talent needs to achieve better results | Organizations are making important strides to develop and align talent to meet organizational needs and to engage staff in an environment that values learning, reflection, and continuous improvement.

- **Implementing people-focused management structures and practices:** All organizations have become more intentional in their approach to developing high-performing teams. Several of them have elevated or created senior-level talent-management positions to focus on staff engagement and coordination. Others have worked to strengthen middle management and develop more robust leadership teams.

- **Aligning talent needs with organizational goals:** While not an easy process, organizational leaders revealed considerable progress in “getting the right people in the right seats.” Prior to 2012, there was ambivalence about the issue, with 36 percent unsure or unable to assess, and 56 percent indicating substantial work that still needed to be done. Two years post-program, 86 percent of leaders indicated having made substantial progress toward this goal. With a keen understanding of skills and attributes needed to strengthen performance, nearly all grantees have made changes to their recruitment, hiring, and onboarding processes.

- **Raising the bar and clarifying performance expectations:** Prior to PropelNext, the majority of organizational leaders said standards of excellence were not clearly articulated or communicated. Post-PropelNext, the majority of leaders (81 percent) said managers have implemented this practice and more than three-quarters of staff indicated that managers regularly conducted performance reviews and worked with staff to mutually define strengths and opportunities for improvement. In focus groups, staff members provided specific examples of how they engaged with supervisors and managers to both clarify expectations and identify professional development goals.

Alumni organizations have sustained gains and expanded their impact in their communities | While PropelNext is not a financial capacity-building program, its focus on performance management has implications for program expansion, fund development, external communications, and strategic partnerships. Most organizations are attracting new funding, serving more youth, strengthening partnerships, and sharpening their communications.

- **Retaining and attracting new sources of funding:** Over three-quarters of alumni organizations have secured new sources of funding and/or retained funding from existing funders. Ten out of 12 organizations have increased their budgets, with a median growth of 36 percent between 2012 and 2016. Leaders and core funders both pointed to stronger, more transparent, and more collaborative grantee–funder relationships. Over 70 percent of leaders said that they have been engaging in more constructive dialogue with funders about their data requirements.

“[Before] we weren’t really a learning organization. We were a reactionary organization . . . more intuitive than intentional.”

–Alumni leader


- **Strengthening strategic partnerships and credibility as field leaders:** Alumni organizations have been increasingly recognized as credible, data-driven, and results-focused leaders among funders, partners, and peer organizations. Many alumni organizations have expanded their partnerships and reported improvement in the overall quality of those relationships. Half of CEOs said that it had been “easy” or “very easy” to engage external partners (e.g., schools) in their new way of running youth development programs. Interviews with peer organizations and partners provided additional evidence of increased credibility in their respective communities.

- **Communicating a more compelling story of impact:** Since PropelNext, alumni have increased their capacity to use data to tell more compelling stories. Communication materials, newsletters, and websites have evolved and improved, and have often included dynamic visuals and charts that clearly show organizational goals, strategies, progress, and outcomes. Several funders and board members noted that there has been more data-informed storytelling and analytical rigor behind alumni’s messaging.

**Concluding Remarks**

In addition to documenting evidence of progress on the journey to high performance, this study highlights the ripple effect of PropelNext’s capacity-building strategies beyond program design and implementation. Two years post-PropelNext, organizations have continued to build muscle and core competencies for performance management, resulting in notable shifts in organizational practices, behaviors, processes, and culture.

As pioneers in “uncharted territory,” alumni organizations reflected on the most critical PropelNext components that helped propel them to the next level. While the combination of intensive and comprehensive supports is part of what makes PropelNext a powerful program, both the high-caliber coaching and cohort-based peer-learning model were acknowledged as “game changers.” With encouragement from EMCF, alumni organizations have developed a strong sense of community, as well as a willingness to lend their support to the PropelNext cohorts that will follow in their footsteps. As one leader put it, “We would jump at any opportunity to collaborate. We’re like the [Harvard Business School] graduates that stay in touch for 50 years.” Others recognized their role and responsibility to advance the field and improve outcomes for at-risk youth. “[We’re] part of elevating the nonprofit sector,” said one executive director, a part working “to create a new standard of doing things for our most vulnerable kids.”

“We used to just tell heart-wrenching stories . . . now we’re saying, ‘This is what we’ve accomplished . . . here are the outcomes we produced.’”

—Alumni leader
**Introduction**

The Edna McConnell Clark Foundation (EMCF) makes large, long-term investments to help high-performing nonprofits scale evidence-based programs that improve the lives of disadvantaged children and youth. In 2012, EMCF launched PropelNext to strengthen the next tier of organizations whose programs had not yet been fully codified. Informed by research and hands-on experience in organizational effectiveness and performance management, EMCF developed PropelNext as an intensive, cohort-based, capacity-building program designed to enhance the effectiveness of promising nonprofits serving America’s disadvantaged youth.

Through PropelNext, cohorts of grantees participate in a structured three-year program supported by a team of experienced consultants that helps grantees build the knowledge, infrastructure, and practices to become data-driven learning organizations. EMCF believes that supporting youth-serving organizations to use data will strengthen their programs and ultimately improve outcomes for youth.

The first national cohort of 12 organizations completed the PropelNext program in 2015.¹ To better understand the impact of PropelNext and how it contributes to improved organizational performance, EMCF partnered with Harder+Company Community Research and Engage R+D to assess post-program progress, achievements, and challenges. The 18-month study triangulates data from diverse sources including in-depth site visits, document review including data reports, surveys, interviews, and focus groups with organizational leaders, middle-managers, front-line staff, board members, partners, and funders.

This report summarizes key insights and findings and is designed to capture the journey of grantees as they continue to cultivate a learning culture and to embed performance management practices into their organizational DNA. Given the evolving nature of the capacity-building field, the study also elevates promising practices and effective ways to help nonprofits use data for continuous learning and improved performance.

**Key Elements of PropelNext**

PropelNext is an intensive program that builds capacity through a strong peer-based learning experience. Grantees in the inaugural cohort were selected through an invitation-only process and underwent a rigorous review of their readiness to benefit from participation in the program. As part of a cohort, grantees received common content and capacity-building support from a dedicated team throughout the three-year period, with certain elements tailored to meet their individual organizational needs.

As part of the inaugural cohort, each grantee received up to $450,000 to support capacity building and implement performance management systems. They also received expert coaching, structured group-learning sessions, performance-management tools, and access to an online-learning platform. Throughout the three-year program, organizations sharpened research-informed program models developed theories of change (TOCs), and engaged in a test-and-learn cycle to promote a culture of learning and continuous improvement.

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¹ Although 13 organizations completed the first cohort of PropelNext, only 12 participated in this study.
comprehensive collection of supports, PropelNext seeks to strengthen the capacity of youth-serving nonprofits to deliver high-quality programs and services that ultimately produce better results for disadvantaged youth. In implementing PropelNext, EMCF worked with LeadWell Partners and Learning for Action (LFA) to design the program and deliver customized coaching and support. Program content was guided by the PropelNext TOC and Dimensions for Building a Learning Organization, a framework designed to assess grantee progress and track key milestones through various stages of the program (see appendix for details of both tools, as well as a detailed description of PropelNext’s comprehensive supports. An overview of general program content is below).

Contextual Considerations

Assessing the impact of capacity-building supports on organizational effectiveness is a challenging craft, given the complex and dynamic nature of organizations and the larger ecosystem in which they operate. Some funders have described impact assessment as the "holy grail" and the "million dollar question," noting the confluence of factors that can influence capacity-building initiatives and the inherent challenge of attribution. Furthermore, more rigorous evaluations that examine both the evolution and impact of capacity-building efforts, over a longer period of time, can become both costly and complicated.

As a result, most evaluations have tended to focus on assessing capacity-building strategies and shorter-term outcomes (e.g., knowledge acquisition or shifts in attitudes and behaviors) rather than meaningful, but hard to measure, long-term impacts such as improved program quality, enhanced organizational performance, and better outcomes for beneficiaries and communities.

PropelNext and this post-program study build upon an evolving field that seeks to

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2 For more information about the consulting team, see the PropelNext website at http://www.propelnext.org/our-program/consulting-partners/.
PropelNext Alumni Study

Introduction

delve deeper into optimizing performance while still recognizing the context and contribution of nonprofits, and other social sector actors, in a broader and constantly changing ecosystem. As noted in TCC Group’s Capacity Building 3.0: How to Strengthen the Social Ecosystem, the new frontier of the field is to more fully integrate program capacity and organizational capacity, as well as provide more support to organizations in managing change. PropelNext falls squarely in this space and the findings from this post-program study aim to build the evidence base for effective capacity-building interventions and strengthen the field of organizational effectiveness.

It is also important to understand the nature of youth-serving organizations and the complex needs of the youth they serve. The first national cohort of PropelNext grantees represented a diverse cross-section of organizations serving disadvantaged youth in urban and rural settings across the country. Organizations were selected by EMCF based on their strong leadership, management capacity, and potential to boost effectiveness and increase impact on the lives of youth.

The grantees worked in a range of areas, including juvenile justice, foster youth, homelessness, and student re-engagement, and often served youth with significant risk factors, trauma, and other barriers to reaching their full potential. Services and interventions were sometimes crisis-driven and progress could be slow and incremental. This is critical context for readers to consider as they review the findings in this report.

About the Evaluation and This Report

Using a collaborative, co-designed approach, this study engaged EMCF, evaluation advisors, the consulting team implementing the program, and alumni leaders to identify indicators of progress and success in the years following PropelNext. We also looked to the literature and sought to identify observable evidence and proof points where, over time, measureable change in practices could be documented. Finally, in addition to assessing progress and change post-PropelNext, this study also considers contextual factors that may have propelled or hindered efforts to improve performance and fulfill an organization’s mission.

The goals of this retrospective study are (1) to assess how PropelNext has contributed to building and sustaining the performance management capacity of grantee organizations after program completion, and (2) to identify the most effective elements of the model and implications for future cohorts. Specific areas of inquiry and questions are summarized below, and more technical details regarding methods, sources, and limitations are available in the appendix.

1. **Sustaining and deepening capacities:** To what extent have alumni organizations sustained the capacities they developed during PropelNext? What conditions facilitated or hindered their efforts?

2. **PropelNext model:** What was the role of PropelNext in helping organizations build and sustain those capacities? What elements of the program were most influential in supporting gains and/or additional progress post-PropelNext?

3. **Outcomes and results:** What have organizations achieved that can be attributed, in part or whole, to their experience in PropelNext? What unexpected achievements or challenges have occurred?

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The evaluation builds upon two frameworks, the Dimensions for Building a Learning Organization (DBLO) and the Performance Imperative Organizational Self-Assessment (PIOSA)\(^5\). The DBLO reflects the key operational and content areas addressed in the PropelNext program and, in an effort to drill deeper in several key areas, the evaluation design also incorporates select questions and “proof points” from the PIOSA on topics related to adaptive leadership, talent development, organizational alignment, and sustainability. Combining the strengths of both tools leads us to focus on six areas:

1. Program model quality and implementation
2. Performance-management systems and technical infrastructure
3. Adaptive leadership
4. Talent development
5. Organizational alignment and integration
6. Sustainability and managing change

As outlined in the table below, the evaluation team gathered information from a multitude of sources and perspectives using a mixed-methods approach.

<table>
<thead>
<tr>
<th>Data Sources and Methods</th>
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<tbody>
<tr>
<td><strong>Retrospective leadership survey</strong></td>
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<tr>
<td>- 12 leaders completed an online survey to assess changes in key areas (one-year post-PropelNext)</td>
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<tr>
<td>- 36 leaders (executive management) partici</td>
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<tr>
<td>pated in a retrospective online survey to assess shifts in performance-management practices using select items from PIOSA (two-years post-PropelNext)</td>
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<tr>
<td><strong>Staff survey</strong></td>
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<tr>
<td>- 65 staff completed surveys to assess confidence using data and integration of performance-management practices and behaviors (two-years post-PropelNext)</td>
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<tr>
<td><strong>Interviews</strong></td>
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<tr>
<td>- 23 program leaders and managers (one-year post-PropelNext)</td>
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<tr>
<td>- 33 leaders participated in interviews as part of site visits (two-years post-PropelNext)</td>
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<tr>
<td>- 23 phone interviews with funders, board members, and institutional partners (two-years post-PropelNext)</td>
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<tr>
<td><strong>Focus groups</strong></td>
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<tr>
<td>- 12 CEOs/EDs (one-year post-PropelNext)</td>
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<tr>
<td>- 65 program and frontline staff during site visits (two-years post-PropelNext)</td>
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<tr>
<td><strong>Meeting observations</strong></td>
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<tr>
<td>Evaluation team observed staff and program meetings to discern how frontline staff used data and engaged in performance-management practices (two-years post-PropelNext).</td>
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<tr>
<td><strong>Document review</strong></td>
</tr>
<tr>
<td>Review of documents (e.g., program models, theories of change, data reports, strategic plans, and financial reports) prior to site visits (two-years post-PropelNext).</td>
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In the absence of a true pre-program baseline, a central part of the evaluation process was a retrospective survey organized around the six areas mentioned above. The evaluation team leveraged a select number of relevant proof points from the PIOSA, focusing on items that strongly aligned with the DBLO and PropelNext program content. The survey gathered information from multiple sources.

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\(^5\) PIOSA is a tool and framework developed collaboratively by the Leap of Reason Ambassadors Community to focus on key organizational principles and proof points that undergird and support high performance. See [https://leapambassadors.org/products/piosa/](https://leapambassadors.org/products/piosa/).
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perspectives within each organization, asking core leaders (e.g., executive directors, CEOs, directors of learning and evaluation, chief program officers) to assess progress for each proof points using a four-point continuum listed below:

- **Not started**: My organization has not started working on this.
- **Partially met**: My organization has begun working on this but has made little progress to date.
- **Substantially met**: We’ve made significant progress on this.
- **Fully met**: We’ve achieved this.

Using these frameworks to guide the evaluation, the team gathered data from multiple perspectives at one-year and two-years post-program (see appendix for the complete methodological framework). Preliminary findings from data collected one-year post-PropelNext were summarized in a learning brief produced in early 2017. This report builds upon those initial findings and drills deeper in the six areas mentioned previously. In addition to assessing the extent to which organizations have institutionalized core performance management capacities, tool, and practices, the evaluation team captures how internal and external factors can influence efforts to build and sustain a learning culture.

**Building a Learning Organization**

Organizational learning is a process that unfolds over time and is typically characterized by institutional cultures that encourage and support continuous improvement and experimentation. In many ways, PropelNext is a disruptive process that challenges grantees to think in new ways and examine the status quo. The practices that organizations learn in PropelNext are not “one and done” events, but rather long-term undertakings to build cultures of learning and embed practices for continuous improvement across organizations. While the initial focus of PropelNext is on designing and testing data-informed program models, the work extends far beyond programming and has profound implications for nearly every aspect of an organization, from strategy, leadership, and culture, to talent management, operations, and fund development.

More than two years after completing PropelNext, alumni organizations identified a significant shift in how they think about, talk about, and do their work. Leaders described their PropelNext experience as transformational and recognized that they are still “on a journey of discovery” as they strive to sustain, deepen, and spread practices across their organization. “It’s an iterative process,” one CEO reflected, “I was hoping that at the end of the yellow brick road I’d get to the Emerald City, but it doesn’t actually happen like that.” When asked about reverting to old ways of thinking, leaders openly acknowledged the inherent pull, as one CEO acknowledged, “[You] can’t go back to what you were before.”

According to alumni, the most transformative changes have been both challenging and rewarding. Some of these changes were initially seeded during the PropelNext program and, more recently, have begun to bear fruit. Some changes were highly visible while others were subtle and hard to identify or name. Specifically, alumni had invested in people, capacities, systems, and processes to more fully infuse learning and continuous improvement into their organizational DNA. When frontline staff members were asked to define what it meant to be a learning organization (see chart on page six), their responses were clear, compelling, and provided additional evidence that a learning mindset permeated their organization.

In this report, we further explore the nuances of building a learning organization and how alumni have continued to embed new knowledge, skills, and capacities.

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PropelNext Alumni Study  Introduction

into their organizational practices and culture. The report begins with a snapshot of the alumni cohort, highlighting key characteristics and tangible changes over the previous five years. It further explores the six core areas introduced previously, by examining shifts in specific organizational practices, behaviors, and processes. The report concludes with insights into the effectiveness of PropelNext strategies and how, in the future, the model can be adapted to support more organizations on their journey to high performance.

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.

**Adaptation:** "For us, a learning organization is an organization that’s adaptive. We’re not running the same programming now that we were running two years ago...we are constantly shifting and adjusting based on what we’ve learned.”

**Reflection:** “I honestly have seen huge changes that really are reflective of the deep thinking that we have constantly tried to do—going back and considering the data.”

**Flexible and open:** “We constantly look at our programs as flexible and being open to change.”

**Lessons learned:** “The biggest lesson from PropelNext is that we are a learning organization, so we are going to make mistakes, but we need to learn from those mistakes. We need to be able to try things and revisit and go back and change and modify.”

**Continuous improvement:** “An organization that acknowledges there’s room for improvement, and that acknowledgement isn’t necessarily a judgment or punitive, per se, but [that] there’s room for development.”

**Continuous feedback:** “A culture of constant feedback, both from folks in power to frontline staff, to folks who are peers...in both formal and informal spaces.”
PropelNext Alumni Study **Introduction**

**A Snapshot of PropelNext Alumni**
The first national cohort of grantees completed PropelNext in 2015. Since then, alumni organizations have seen substantial growth and progress. Let's take a look at some of the defining characteristics of PropelNext’s 12 alumni grantees.

**DEFINING CHARACTERISTICS**
Committed to serving disadvantaged youth through innovative practices and programming, alumni organizations work in a variety of fields:
- Juvenile Justice
- Workforce Development
- Student Reengagement
- Academic Achievement
- Experiential Leadership
- Community Building
- Foster Youth
- Social Enterprise
- Homelessness

PropelNext alumni are a regionally diverse group of organizations hailing from all corners of the U.S.

**EXPANDED PROGRAMMING**
10 of 12 alumni organizations have more program options or have expanded to new program sites since PropelNext.

For example, one organization increased their school partnerships by 100%. Another organization expanded programming to an additional county and 13 new cities.

**MORE YOUTH SERVED**
10 of 12 alumni organizations reported having more program participants since PropelNext.

In 2012 organizations served between 59 & 3189 youth annually. With a median growth of 53% since PropelNext, organizations now serve between 100 & 4679 youth annually.*

**DEDICATED LEARNING AND EVALUATION TEAMS**
Before PropelNext only five organizations had data and evaluation staff, compared to 11 organizations in 2017.

In 2017, alumni organizations had an average of 2.3 FTE data and evaluation staff, compared to an average of 0.5 in 2012.

**FINANCIAL GROWTH**
Since PropelNext, the majority of alumni organizations (10 of 12) saw their budgets’ grow, with a few experiencing phenomenal financial growth.

The median percentage of budget growth alumni experienced between 2012 and 2016.

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*The wide range of youth served reflects the diverse types of services alumni organizations provide. For example, at least one organization runs a residential program, providing an intensive series to a smaller number of youth.
Program Model Quality and Implementation

A central thrust of the PropelNext program is to guide grantees through a rigorous process of designing, testing, and refining program models that are data-driven, informed by research, and guided by a solid theory of change. Through this process, organizations are able to clarify their strategies, intended outcomes, and ultimate impact on the youth they serve. In this section, we explore how alumni organizations have embedded more rigorous program development and implementation practices, as well as the tools and strategies that they have embraced to ensure program fidelity. Findings suggest that organizations have made notable progress sustaining and advancing PropelNext capacities in the following ways:

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

Institutionalizing Codified Program Models Based on Research and Evidence

Since PropelNext, nearly all alumni have institutionalized the use of theories of change and program models by extending the practice to other programs and aspects of their organizations. When asked to indicate the extent to which their program teams implement services based on codified program models, over 80 percent of leadership surveyed said they had substantially or fully implemented this practice, compared to 6 percent prior PropelNext (Exhibit 1).

Exhibit 1. Program teams implement services based on codified program models ($n = 36$)

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not started</td>
<td>36%</td>
</tr>
<tr>
<td>Partially met</td>
<td>28%</td>
</tr>
<tr>
<td>Substantially met</td>
<td>6%</td>
</tr>
<tr>
<td>Fully met</td>
<td>30%</td>
</tr>
<tr>
<td>Not sure/Not applicable</td>
<td></td>
</tr>
<tr>
<td>17%</td>
<td>64%</td>
</tr>
<tr>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

For many alumni, the program model has become a core tenet of their practice. One program director commented, “To be a program, you have to have a program model . . . this change in mindset has seeped into the way we behave.”

Alumni emphasized the importance of the process, of developing a codified program model, as a foundation of high-quality programming. One leader noted, “It’s not just sitting in a room and getting everything on a piece of paper.” Leadership from several organizations reported that they have intentionally

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Theory of Change Defined

A theory of change is an organizing principle that aligns programmatic strategy (based on research and/or best practices, beliefs, and assumptions) with program design, implementation, measurement, and outcomes, and articulates hypotheses to test how a program improves its outcomes.
included frontline and program staff in this process since participating in PropelNext. Several talked about program models as being an important tool for staff engagement. According to one leader, "It’s taken a lot of time, a lot of effort, a lot of staff willingness to sit down and be openminded, and put everything on the table and say, ‘Let’s look at how we’ve been doing things and how we need to do it moving forward.’" Another leader noted “a whole different level of buy-in and excitement.” In addition to buy-in, frontline staff brought their on-the-ground experience and perspective, enriching the quality and fidelity of implementation.

Several alumni leaders acknowledged that before participating in PropelNext their programming was often driven by intuition rather than evidence. Prior to PropelNext, only 11 percent of leadership said that the practice of regularly assembling and reviewing the best available data to develop or refine key programs and strategies had been substantially or fully implemented, compared to 91 percent of leadership in 2017, post-PropelNext (see Exhibit 2). The next section of the report provides specific examples of the data practices alumni have used to develop, refine, and improve their programs and strategies.

Exhibit 2. Almost all organizations use data to develop and refine programs and strategies (n = 36)

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>42%</td>
<td>69%</td>
</tr>
<tr>
<td>11%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Several alumni described their previous approach to programming as "feel good" or “drop-in” programming that lacked direction and focus. One organization said their approach to programming often entailed "jumping in and either developing something or changing something" without slowing down to ask why. Before PropelNext, a different leader offered, "We would have an idea and we’d implement it, [but now we’re] more intentional about making sure whatever we’re thinking is grounded in some type of best practices or evidence-based work.”

Moving to a more evidence-based approach challenged staff to think and act differently by injecting more intentionality and structure into the way they worked with youth. One leader reported that they’ve worked with staff to create “structure around how decisions are made, a decision tree versus an emotional tree.” A staff member from a different organization reported that when they have introduced a new intervention or strategy, leadership encouraged them to step back, think critically, and ask questions, such as “Is this something that we want to reevaluate? Is this something that has worked for us? Is this something that we are hearing young people have a need for? Is this something being supported by data?”

Alumni affirmed that having clear outcomes and adapting their programs based on evidence was the only way to achieve better results for youth. A leader from a different organization explained, "As we develop our new programs, everything has
to have an outcome. Everything has to have some type of accountability mechanism.”

In the two years since PropelNext organizations clarified their target populations, recruitment strategies, and program outcomes. One leader reflected, “We thought we knew who we were providing services to [before PropelNext] and we realized we couldn't articulate that.” With a clearer understanding of who they wanted to reach, alumni became savvier at identifying which outcomes were clearly linked to their programs and reflected the change they sought. For some, outcomes that were previously ambiguous or superficial became clear. As one leader said, “We've changed outcomes in so many programs to really reflect how we want [the young person] to be different as a result of our work, rather than them hitting these things that really aren’t connected to the work we’re doing.”

Across alumni organizations, staff highlighted the program model as a foundational document that provided clarity and direction to help them do their jobs effectively. Staff from several organizations noted programming was less structured and streamlined before PropelNext. One commented, “[The program model] really gave us more guidance to bring things together” and to clearly see how the various components fit together. A staff member at another organization explained how the program model kept them grounded and helped problem solving, by allowing the staff member to reflect on how the program fit within their broader umbrella of youth services. Others shared how their program model served as a tool for communicating and building rapport with their partners.

Some alumni realized that more meaningful program outcomes could take longer to achieve. This was true for two alumni organizations that had shifted their target populations to focus on higher-risk youth and that were now grappling with the slower pace of change. One organization explained how this posed challenges when they tried to “tell their story” to funders who were eager to see “high success rates” immediately. While they were still learning how to share this new way of working, they ultimately understood that “if you choose to focus on more challenging populations, you’re going to be faced with data that isn’t always going to be as rosy.” A leader from a different alumni organization that faced similar challenges offered words of advice: “Don’t be discouraged in the first few years if your outcomes are actually stagnating or declining, because guess what, you’re working with folks who have greater needs.”

### Strengthening Fidelity and Accountability

PropelNext alumni reported improvements in program quality, highlighting the program model framework as integral to strengthening fidelity. The program model and more detailed implementation guides have helped organizations determine whether services are implemented as intended and give frontline staff clear direction on target population, dosage, and outcomes. One organization that implements programming across multiple school sites saw a significant improvement in fidelity, with a staff member noting, “When I started [at the organization], the work looked much more variable across schools and I think there’s a much higher level of consistency . . . there’s a common thread across all of the schools and the program model is a big part of why.”

Several alumni have changed the frequency and structure of meetings and supervision to improve program fidelity. One organization has been holding standing meetings every week to review the program model. Another organization restructured supervision to be fidelity-driven and to spend more hands-on time with frontline staff, to ensure that data would be clean and in the system before discussing what should happen next. As one staff member stated, “There’s a lot more accountability around the fidelity and I think that’s largely because of defining the program model.” The majority of alumni reported having a dedicated individual
or team who is responsible for monitoring whether programs are implemented with fidelity, with 87 percent of leaders reporting this practice had been substantially or fully implemented post-PropelNext, compared to 11 percent before PropelNext (see Exhibit 3).

Exhibit 3. The majority of alumni have an individual or team responsible for tracking fidelity ($n = 36$)\textsuperscript{7}

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not started</td>
<td>42%</td>
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<td>11%</td>
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<tr>
<td>Fully met</td>
<td>30%</td>
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</tbody>
</table>

While fidelity has generally improved, some organizations continue to face challenges. For example, implementing programs with fidelity is a heavier lift for organizations that have multiple sites or work across geographies. As one leader put it, “Most of our programming happens at a bunch of different places, so fidelity is a very tricky issue for us, because we [leadership] have to just rely on others to be managing that experience.” A different organization began taking steps to improve fidelity across sites with more thorough training and shadowing opportunities for program managers.

Organizations that rely heavily on clinical interventions, like case management, also appear to face more challenges with fidelity. In these cases, assessing fidelity goes beyond tracking dosage or duration to focus on the content of interactions with youth. These organizations required more intensive strategies for assessing fidelity, including relying on qualitative data, observations, or an increased level of supervision. As one leader explained, “The dosage, you can count [but the] face-to-face interaction, having that conversation… is a little bit harder to track.” The same organization used a combination of analyzing case notes and intensive supervision to address this issue, and the leader elaborated, “The fidelity part, you really have to meet and talk to staff, make sure they have a deeper understanding of what the interaction should be, and then follow along the notes to see how they’re doing.”

Listening and Learning from Program Participants and Beneficiaries

Alumni acknowledged that prior to PropelNext they were inconsistent or used “less sophisticated” methods to collect feedback from youth and program beneficiaries. As their capacity to collect and use data has grown, most organizations have increased efforts to systematically gather and use youth feedback for continuous quality improvement. Specifically, alumni have enhanced the methods and frequency with which they collect feedback from youth. A few of these organizations have used mixed methods to gain a holistic picture of how youth were progressing and experiencing the program, including employing anonymous surveys and in-person interviews to dig deeper into the youth experience. Alumni

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\textsuperscript{7} Responses are not shown for values under 5 percent.
have also shifted the frequency and timing of data collection to align with key phases and touch points in their programs, allowing for more rapid and meaningful data that supports real-time course corrections. "We survey [youth] quite a bit throughout their time with us," one leader noted, "the results come really quick and the team can identify issues," and address problems like "why we’re only getting 20 percent of kids who are saying they are completing their homework." A different organization planned to take a similar approach with "more rapid cycle" feedback that supports continuous improvement rather than just "surveying young people on their way out the door."

Some organizations have been using innovative approaches to gather youth feedback such as photovoice, a participatory method that utilizes photographs or visual media to describe a participant’s experience in a program. Three organizations established youth councils or youth advisory boards to ensure that these perspectives were elevated across the organization. One leader shared how the youth-advisory board influenced decision-making, "We talk about making plans with our young people versus for our young people. We've even taken that up to the administrative level with the implementation of a youth-advisory board that guides some of our work. We'll take strategic issues or problems to them and say, 'We need a youth perspective. Tell us what you think.' I think that's different than [how] we've done business in the past."

Alumni acknowledged a few challenges in gathering youth feedback. Several organizations noted that lack of buy-in or trust from youth could make it difficult to solicit feedback in the early stages of programming. Other organizations were still in the process of learning how to tweak their tools and methods to improve the quality of feedback, including examining how they structured questions. One staff member, who administered satisfaction surveys, said she constantly tweaked her survey tools to improve feedback quality.

Eight of 12 PropelNext alumni organizations are Listen for Good grantees, receiving two-year grants to help them build their practice of gathering feedback from youth. Listen for Good, a program of the Fund for Shared Insight, supports grantees in collecting, interpreting, and responding to feedback gathered through a semi-standard survey instrument, which includes applying the Net Promoter System (NPS®) that is employed widely in customer feedback circles, to the nonprofit beneficiary context. One leader lauded the support provided by the opportunity to further expand their capabilities and also how it has strengthened their capacity to collect higher-quality, actionable data: "Listen for Good is going to help us take that to the next level."

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Alumni are strengthening fidelity with the support of new tools and practices that have been adopted since PropelNext. Highlighted below are two alumni organizations that are increasing their capacity to implement programs with fidelity through unique approaches of their own.

**PropelNext Exemplars:**
**Tools and Practices that Strengthen Fidelity**

**UTEC**, based in Lowell, Massachusetts, aspires to reduce recidivism and criminal activity, and increase educational attainment and employability among youth aged 16–24. UTEC’s integrated programming includes five social enterprises and serves approximately 150 young adults intensively each year (and over 700 young adults through outreach and events). After PropelNext, UTEC institutionalized the practice of developing what they call Department Implementation Guides (DIGs), which document how all of their programming works. Guided by their theory of change and program models, DIGs aim to document what it really takes to implement UTEC programming on a daily basis. These tools offer a step-by-step approach to everything from enrollment, to staff training, to data entry. As UTEC put it, “DIGs are meant to codify the model, but we’re constantly revisiting them, updating them based on what’s actually happening.” Furthermore, program staff provides the content themselves, which ensures the DIGs document the most recent iteration of UTEC’s work.

**DREAM** is a charter school and a nonprofit organization that provides education, after-school, and summer programming to inner-city youth. With six distinct programs that serve youth across East Harlem, Newark, and the South Bronx, DREAM provides programming on a scale that makes fidelity uniquely challenging. In order to ensure that their various programming is implemented consistently across sites, program managers and directors conduct Program Quality Observations (PQOs) at least once per month. According to one leader, the PQOs help managers assess and support frontline staff’s engagement with children and youth, while ensuring alignment with the program model. DREAM developed a PQO tool that guides the observation and highlights six areas of programming that managers and directors observe and rate during the session, including youth relationships, youth participation, staff-directed relationships, facilitation and delivery, content and structure, and environmental factors. To ensure that their PQOs are reliable, DREAM conducts training in norming for program managers and directors to ensure that staff is consistent in their ratings. PQOs are now used across DREAM’s programs, even in the athletic programming, which poses its own unique challenges for observation and fidelity. DREAM recently trained a larger group of staff on how to use the PQO tool, which increases their capacity to implement PQOs across programming and with higher frequency, giving them an even greater edge in their efforts to strengthen program fidelity.
Performance Management Systems and Technical Infrastructure

PropelNext provides organizations with financial support and technical coaching to implement robust data systems. During the program, some alumni chose to expand existing systems while others acquired new platforms from data vendors. Most have hired new staff, expanded existing data teams, and several have elevated the role of key evaluation staff to provide director-level strategic support. Across the cohort, the investment in staff capacity has been dramatic. Seven of the 12 organizations did not have dedicated evaluation staff before PropelNext, while 11 of the 12 had dedicated evaluation staff, post-PropelNext. Ten of the 12 also added data teams of between one-and-three people, and two organizations had larger teams. Implementing data systems and building the capacity and confidence of staff to use data has taken considerable time and patience. With dedication and a commitment to invest in building technical and human capacity, organizations have made important strides in the following ways:

- Using robust data systems and right-sizing platforms to support evolving needs
- Strengthening capacity of frontline staff to use data effectively
- Building an internal data and evaluation team
- Reflecting and thinking critically about relevance and utility of data

Using Robust Data Systems and Right-Sizing Platforms to Support Needs

Alumni organizations have consolidated previously-disparate sources of information into one centralized system and radically improved standardized collection and use of data. One leader shared how "one thing that's been exciting is having a home for all the information that used to live in people's heads, on paper documents, spreadsheets, and computer files." Other leaders concurred, noting integrated data systems have allowed for more nuanced and robust data collection, analysis, and reporting. "Our program model is fairly complicated," one leader said, "we needed a data system that can handle that level of complexity . . . we can [now] collect data in a number of different ways" and generate different types of reports. The evaluation team reviewed data reports which organizations generated prior to PropelNext, as well as data reports generated post-PropelNext. The evaluation team observed notable shifts in versatility, level of rigor, and ability to synthesize information across multiple sources. For example, prior to PropelNext, one organization housed all their data in an excel spreadsheet that was cumbersome and tricky to navigate. Post-PropelNext, they created actionable data reports that summarized their learnings and program modifications using charts, graphs, and interpretive narratives. The evaluation team reviewed comparative data reports from nine other alumni organizations and observed similar shifts.

While more powerful data systems have clearly helped alumni organizations take data use to new levels, technical limitations and other constraints have posed a myriad of challenges to some organizations. According to one leader, issues with their data system have hindered efforts to foster a data-driven culture. "It's a red herring," the leader explained, technical issues "provide excuses for staff who are resisting. There are some legitimate concerns—is it providing real-time data that

"[What] definitely wouldn't have happened the same sort of way without PropelNext, was just the movement from a data system that was really just a collection of tools to a data system that allows for analysis."

—Alumni leader
can drive frontline staff to make decisions that serve youth better? That’s the whole point. So, that’s where the data system problem has slowed us down.” Leaders cited technical issues, rigid structures, and lackluster customer support from data vendors as barriers to success. A few organizations acknowledged that some issues stem from the way the system was initially set-up. Multi-service organizations and those that partner with schools expressed a need for data platforms that can better communicate with each other. Regardless, most organizations expressed some level of frustration with their data systems and several said that they have outgrown their current systems and are exploring other options.

Leaders also recognized that training, support, and regular use of data systems helps to build the practice of using and valuing data. One leader reflected on the “learning curve of just getting people into the habit of using this database.” Another leader observed, “It takes probably about six months” for staff to become comfortable with the new system, before adding, “It’s not intuitive for users who are not spending all day [using it].” Nevertheless, the same leader felt that “once they do invest the time and training, the folks who find it most useful are the people who have spent the most time learning how to use it, and how to make it work for them.”

Ten out of 12 organizations still use the data systems implemented during or before PropelNext, including several who have added complementary systems, and four organizations who have begun exploring whether to replace or augment their systems in the near future. One organization has swapped out their systems completely, opting instead for more customizable, simplified, and interactive platform that uses Tableau for visualizing data. Finding the right fit for their organizational needs, said one respondent, “has really transformed the way people access data and use it to make decisions, because it’s relevant to them, and they’re seeing it in the exact way that they want to see it. They helped design the dashboards.”

Technical issues aside, alumni valued the monetary and coaching support from PropelNext. One leader explained how his organization anticipated these growing pains from the start, “One of our coaches basically said, ‘As your organization becomes more sophisticated in its data collection, whatever system you have, may not be the system that you have moving forward.’” Another said that the financial support “was really important because you don’t have that kind of money hanging around a nonprofit” for a data system, and the technical coaching “opened up a whole new world for us.”

**Strengthening Capacity of Frontline Staff to Use Data**

More frontline and program staff members are regularly using data to improve their day-to-day work. According to leaders surveyed, most frontline staff had limited to no access to data on a daily basis prior to PropelNext. Since PropelNext, 78 percent said this practice had been substantially or fully integrated into their work, suggesting a substantial shift in the number of frontline staff with regular access to data (Exhibit 4).
Exhibit 4. Frontline staff have access to data that help them do their jobs effectively on an everyday basis (n = 36)\(^9\)

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>39% 22% 8% 30%</td>
<td>19% 53% 25%</td>
</tr>
</tbody>
</table>

In addition to improved access, leaders have observed frontline staff consistently using data to inform their day-to-day work. Few leaders saw evidence of frontline staff using data before PropelNext, however, there was a notable shift post-PropelNext, with 56 percent indicating this practice was either substantially or fully met (Exhibit 5). At the same time, approximately 40 percent indicated this practice was being partially met, suggesting that there remained room for improvement.

Exhibit 5. Leaders see evidence of frontline staff consistently using data to help them do their jobs effectively (n = 36)\(^10\)

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>42% 22% 30%</td>
<td>39% 39% 17%</td>
</tr>
</tbody>
</table>

Frontline staff are increasingly taking ownership by entering their own data, running reports, and engaging in analytic discussions with their teams. During site visits, the evaluation team observed frontline staff presenting and analyzing data, as well as troubleshooting and discussing actionable next steps. At one organization, the evaluation team observed a program-team meeting that provided many opportunities for participation and where team members responded by actively participating. At various points throughout the meeting, each staff member selected and discussed a data point, raising an issue to troubleshoot or discuss. As one staff member put it, "We're constantly using that data to align [our] strategy and support."

One staff member from a different alumni organization noted, prior to PropelNext “we collected data but there was no analyzing it.” Post-PropelNext, staff members

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\(^9\) Responses are not shown for values under 5 percent.

\(^10\) Responses are not shown for values under 5 percent.
have used data to monitor progress and make course corrections. Nearly half of all staff surveyed reported the daily gathering of data on program participants, and 40 percent collected data one-to-two times per week. More than three-fifths of staff reported using data to track program participant progress at least one-to-two times per week and about 25 percent use data to improve program design (Exhibit 6). As one staff member said, “Data’s in almost everything we do . . . I am able to then use all that data to plan much more targeted interventions than if I didn’t [have that data].”

Exhibit 6. Staff report frequently using data to monitor progress of program participants

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>1-2 times per year</th>
<th>1-2 times per month</th>
<th>1-2 times per week</th>
<th>Daily</th>
<th>Not sure/Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gather data on program participants</td>
<td>40%</td>
<td>46%</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate data reports</td>
<td>5%</td>
<td>29%</td>
<td>34%</td>
<td>12%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Share and discuss data with other</td>
<td>5%</td>
<td>25%</td>
<td>37%</td>
<td>23%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>leadership (n=64)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use data to improve program design</td>
<td>23%</td>
<td>31%</td>
<td>5%</td>
<td>18%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Use data to determine if program</td>
<td>8%</td>
<td>20%</td>
<td>43%</td>
<td>18%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>participants are on track (n=65)</td>
<td></td>
<td></td>
<td></td>
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</table>

Some organizations have established processes such as self-populating dashboards and weekly, auto-generated individualized reports that help staff monitor the progress of program participants. Leaders noted how staff have become more critical of the data and how this has helped elevate data integrity and quality. One leader observed how “[staff] were really reflecting [on] those numbers” and when numbers seemed unusually low, asked, “Is that because I didn’t put everything I need to put into the database? Or is that the actual number and we need to talk about why it looks like that?”

The staff survey also revealed increased confidence in collecting, sharing, and discussing data (Exhibit 7). More than two-thirds of staff reported feeling either “very confident” or “completely confident” determining what data should be collected to improve programs and assess participant outcomes. In addition, 68 percent reported feeling “very or completely confident” sharing and discussing data with colleagues and leadership. Three quarters reported feeling “very or completely confident” using data to improve programs, assess participant needs and trends, and inform other organizational decisions. During site visits, nearly all observations of meetings revealed frontline staff confidently discussing and reflecting on data with a critical eye. Furthermore, the evaluation team observed frontline and program staff, from six alumni organizations, making decisions in real-time based on data, with one organization supplying staff with a worksheet to document data-driven action steps.
Exhibit 7. Over half of alumni staff reported feeling very or completely confident in collecting, sharing, and discussing data\textsuperscript{11}

<table>
<thead>
<tr>
<th>Activity</th>
<th>Not confident at all</th>
<th>Not very confident</th>
<th>Somewhat confident</th>
<th>Very confident</th>
<th>Completely confident</th>
<th>Not sure/Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determining what type of data to collect for program improvement and assessing participant outcomes (n=65)*</td>
<td>6%</td>
<td>22%</td>
<td>51%</td>
<td>14%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Sharing and discussing data and its implications with other staff and leadership (n=62)*</td>
<td>23%</td>
<td>40%</td>
<td>28%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using data to make program improvements, assess participant needs and trends, or to inform other organizational decisions (n=65)</td>
<td>23%</td>
<td>49%</td>
<td>25%</td>
<td>3%</td>
<td></td>
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</tbody>
</table>

Interviews with leaders and staff also revealed that this team-driven orientation for data and learning has reshaped how frontline staff engages with youth. One staff member shared how interactions with youth in their employment program started to involve “full check-in meetings with the whole team. It used to be just the program manager would have a performance review, and now you get your entire youth work team in a room, and it’s like three adults who are supporting you.”

At some organizations, data analysis and synthesis are a centralized function and reports are generated by the data and evaluation team. In most cases, the centralization was due to systems’ limitations, which do not allow easy access for all staff. By and large, this was viewed as a barrier to engaging frontline staff. One evaluation manager noted how her department produces basic reports for staff “to provide them what we think that they might want to know. . . . In a perfect world they would be able to just engage with [the data] on their own. I imagine if we didn’t spend our time doing that, we might be able to do some much more interesting reports, because they would just have access to it at their fingertips.”

In contrast, the evaluation team observed other organizations extending roles and responsibilities related to data to frontline staff. For example, some staff have more freedom to independently run data reports and engage data analysis and synthesis. In these instances, data was more likely to be embraced and utilized across roles and functions. While the evaluation team did not observe any significant differences in data quality between organizations where data analysis and synthesis were centralized, staff with direct-access to data and reports was observed to be more comfortable and proactive interpreting and using data.

Building an Internal Data and Evaluation Team

Eighteen percent of leadership reported that before PropelNext they had substantially or fully met the goal of having staff responsible for the implementation and maintenance of their data system, compared to 97 percent post-PropelNext (Exhibit 8).

\textsuperscript{11} Items not labeled and with * represent less than 5 percent. Figure may not total 100 percent due to rounding.
Exhibit 8. Almost all alumni have staff responsible for implementing and maintaining their data systems ($n = 36$)$^{12}$

<table>
<thead>
<tr>
<th>Prior to June 2012</th>
<th>Now</th>
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<tbody>
<tr>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>14%</td>
<td>83%</td>
</tr>
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For many organizations, identifying and retaining the right individuals to fill data management positions has not been an easy task to achieve. As one leader explained, “We had nothing when we started PropelNext. The first few years we didn't really invest much in that position and it turned over constantly. And I would say now we have a dedicated, 100% [position].” In general, nearly all alumni organizations had created both analyst and director-level positions to drive high-level conversations about learning and continuous improvement. One leader described the value of a high-level evaluation position, “We have a well-designed set of metrics. They are constantly evolving. We have the expertise of staff, now, to help provide leadership around that, and so I think there’s a great deal more confidence internally that we can manage the data needs that we have . . . It's sort of less about the tool and more about the capacity.”

Alumni value their data and evaluation staff members who play important roles in supporting organization-wide learning and data use. One leader explained, “What came along with [the data system] for us was that we hired somebody, our learning manager. If we just had [the data system], I'm not sure [what progress we would have made], but we've got this person to troubleshoot and help people . . . If they don't understand what's happening, they can go to that person. I think it went hand in hand . . . It's been a huge help in allowing us to accomplish what we wanted to, which was making sure the data’s informing our work.”

Reflecting and Thinking Critically about Relevance and Utility of Data

Alumni organizations have become increasingly thoughtful about the data they collect and how it informs programmatic decisions and organizational learning. Only 14 percent of leaders reported that before PropelNext the practice of having staff regularly assess the utility of data collected was substantially or fully implemented, compared to 86 percent post-PropelNext (Exhibit 9).

“We have hired folks around the data, both collection and management and analysis functions . . . That’s a great long-term investment that they made that I don’t know they would have made without going through this program.”

—Alumni board member

$^{12}$ Responses are not shown for values under 5 percent.
Exhibit 9. Most alumni have a staff member or a team periodically assess whether data continues to have high value and relevance ($n = 36$)\textsuperscript{13}

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Both leadership and staff described the initial excitement to collect as much data as possible before realizing that having more data was not necessarily the same as having better data. One leader described, "We are still in a process of shifting people from being distracted by having too many data points, to understanding where you should be focusing your energy and your effort to understand where we are from a performance-management standpoint.” Having a fully developed program model and theory of change has enabled organizations to pare down and focus their data collection efforts. One leader described this alignment, “We didn’t have a sophisticated system before . . . we were getting a lot of demographic data or point in time data . . . And now, by our theory of change, the outputs and the intermediate measures and the outcomes are much more clear to people.”

\textsuperscript{13} Responses are not shown for values under 5 percent.


PropelNext Exemplars:
Establishing Data Systems and Practices to Support Success

Alumni organizations are embracing data and modifying the systems and practices implemented during PropelNext as they reflect on their needs moving forward. Highlighted below are two alumni organizations that are advancing their data use through unique approaches of their own.

Based in Manhattan and partnering with public high schools in New York City, Blue Engine employs a team-teaching model to advance academic achievement for low-income students. In support of this model, Blue Engine uses innovative practices that democratize access to, and learning from, data. After working with a data system for several years, the organization found it to be too rigid to meet their need for dynamic, real-time information. The data and evaluation director researched systems in use at other organizations and decided a Google-based system, built in-house, would better fit their needs. The director engaged another staff member to help build the system, and the organization recently purchased Tableau to generate data visuals and dashboards. Program staff was engaged to help design basic dashboards, and the new data system has allowed the organization to decentralize data analysis. As the learning and evaluation team supports analysis efforts, individual staff and teams are able to easily and frequently access and assess their data, applying the filters and tools that meet specific needs during team meetings and check-ins. According to the evaluation director, the new system linked to Tableau has “transformed how people access data and use it to make decisions.” Blue Engine’s orientation towards organization-wide data analysis and learning has helped the organization to better understand their infrastructure needs and identify solutions that work for them.

Youth Services of Tulsa (YST) provides a wide breadth of social, life skills, and job-training services for homeless and at-risk young adults in the Tulsa, OK area. During and after PropelNext, leadership and staff at YST have embraced the value-add of incorporating robust data into thoughtful reflection and decision-making. According to YST’s Executive Director, data “triggers the investigative process: ‘what is it telling us? Why is it telling us? What factors play into this number? Are there things that we’re not thinking about?’” YST uses data to develop benchmarks of success, not only in client outcomes, but also as metrics of staff job performance. Notably, data shapes the language that leadership uses to communicate to funders. As a result of the capacity built during PropelNext, and their ability to communicate effectively—incorporating both narrative and compelling infographics, as well as “hard” numbers—YST has increasingly been able to secure more funding to sustain the program piloted as part of PropelNext, as well as other programs within the organization. This confidence in their ability to grow their funding, even in politically and economically-challenging times, has allowed YST to become more self-sufficient and less reliant on government-funded subsidies, setting them up for long-term stability.
Adaptive Leadership

Research and field insights into organizational effectiveness underscore the critical role leaders play as champions for organizational learning by their articulation of a vision and learning goals that clearly connect to the mission of their organization. Of equal importance is the role leaders play in modeling learning practices and guiding the creation of cultures that value curiosity and innovation. PropelNext provides organizational leaders with knowledge and guidance on adapting to, leading, and managing change. In this section, we explore the ways alumni leaders communicate a clear vision, the urgency and opportunity for building a learning organization, and how they inspire a culture of continuous improvement. Specifically, we highlight key practices, behaviors, and tangible examples of adaptive leadership in the following areas:

- Modeling and inspiring a learning 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

Modeling and Inspiring a Learning Culture

Organizational leaders have a clear and unfettered understanding of the critical role they play in modeling and inspiring a culture of learning by encouraging people throughout their organization to be curious and data-driven. As one executive director noted, “We are the culture keepers, the people who can spread the culture of learning and curiosity, who have high emotional intelligence and can read the room and understand what is, or isn’t, landing well.” Another commented that “we model that kind of behavior all the time in what we do.”

The practice of regularly sharing and discussing organizational results serves not only as a model for others but also demonstrates how leaders could translate their commitment to learning into organizational practice. As part of the retrospective survey of alumni leaders, respondents reflected on the extent to which they regularly share program and overall organizational results with staff and board, allowing for questions, celebrating successes, and learning from failures. The majority of leaders (61 percent) expressed that this was not a regular practice prior to PropelNext, and 28 percent were unsure or unable to assess their practices. Post-PropelNext, 89 percent indicated that they were substantially or fully implementing this practice (Exhibit 10).

“[Before] we weren’t really a learning organization. We were a reactionary organization . . . more intuitive than intentional.”

—Alumni leader

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Exhibit 10. Leadership regularly shares results with staff and board (n = 36)\textsuperscript{15}

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Leaders were also asked to reflect on intentional spaces to engage with people at all levels of their organization in the practice of reflecting on results and opportunities for improvement. Approximately 30 percent were unable to assess and 53 percent indicated this was not a common practice before PropelNext. After PropelNext, 86 percent indicated that this practice had been substantially or fully implemented, while 14 percent indicated that it had started to take root (Exhibit 11). Across participating organizations, feedback from staff was consistently favorable with 79 percent indicating that this practice was substantially or fully implemented.

Exhibit 11. Leaders create frequent opportunities for reflection (n = 36)

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Observations, interviews, and focus groups with organizational leaders, staff, and board members provided further evidence of these shifts in practice. One director shared how they frequently pause during discussions or staff meetings to say, "Why don’t we put this conversation on hold until we actually have the data.” Leaders have been self-reflective in acknowledging that they do not have all the answers. They also openly acknowledged the iterative and long-term nature of organizational change and the resilience and self-awareness needed to lead a learning organization. One executive leader reflected, “There’s a great acceptance that it’s a journey” and an iterative process "rather than a holy grail.”

Surveys and focus groups with frontline staff provided additional evidence that leaders have spread the language and practice of learning throughout all levels of the organization. Staff shared specific stories of executive leaders regularly modeling a culture of inquiry and engaging staff in using data for continuous improvement. One staff member told of how the organization’s executive director

\textsuperscript{15} Responses are not shown for values under 5 percent.
PropelNext Alumni Study  Adaptive Leadership

continuously encourages staff to reflect on data and to be curious: “He really takes data seriously. He asks as an organization, what can we do to improve? What can we do to make it better? I’ve been here a little over three years, and every year [he] has done that.”

Using Data and Research to Inform Organizational Decisions

More organizational leaders are actively and regularly using data and research to inform strategic, operational, and programmatic decisions. Leaders openly acknowledged that before PropelNext intuition and anecdotal information often drove decision making. The retrospective survey, focus groups, and interviews revealed a notable shift in practice with the vast majority of leaders having begun to regularly use qualitative and quantitative data for more effective decision-making. More than half of organizational leaders (56 percent) indicated that they had not implemented or only partially implemented this practice before PropelNext, while 30 percent were unable to assess. Post-PropelNext, responses revealed a substantial shift with 81 percent of leaders saying they substantially or fully implemented this practice (Exhibit 12).

Exhibit 12. Managers regularly use data to inform their decisions

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Managers regularly use qualitative and quantitative data to inform their operational, programmatic, and strategic decisions

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Similar trends were also observed in the use of research and evidence to inform learning and organizational effectiveness. When leaders were asked about the use of research pre-PropelNext, 50 percent of respondents indicated that it was not a regular practice, and 30 percent were unable to assess. Post-program, 73 percent of respondents indicated that the practice had been substantially or fully implemented and the remaining 27 percent indicated making some progress towards embedding this practice into their organizational DNA. Staff responses were aligned, with the overwhelming majority (86 percent) indicating that this had become a substantially or fully implemented practice.

Conversations with leaders and staff provided further evidence of the thoughtful use of research and data to understand needs and to inform strategic decisions. One CEO described how they applied this practice to decisions about resource allocations, “We really took our time to study it and then apply that knowledge . . . When the organization gets bigger, administration has to get bigger too . . . We used data and then had to take some initial leaps of faith to make some of those personnel changes.” Interviews with board members provided further evidence of this shift. According to one board member, “If you ask [the CEO] about decisions, he always has a persuasive evidence-based answer for why they made the decisions that they made.”

—Alumni leader

“The data triggers the conversation . . . triggers the investigative process. What is it telling us? What factors play into this number?”

—Alumni leader

“There was a mentality at one time in this organization that more was better, so we were always pushing to serve more kids without really looking at what we were accomplishing.”

—Alumni leader

16 Responses are not shown for values under 5 percent.
Exercising Discipline and Learning from Failures

PropelNext has helped organizational leaders build the discipline to make difficult decisions, particularly when results fall short of expectations or the data did not tell them what they hoped to hear. Several leaders said that access to better data has not only informed decision-making but that it also provided objective and justifiable rationale for making and communicating difficult decisions. One CEO, on the decision to eliminate a long-time program, reflected, "[It was] a very lovely program, feels good, is adding some value, it's better than nothing. But in terms of our new way of thinking, and in looking at data, it's like, 'No, no, this isn't good enough.'"

Prior to PropelNext, organizational leaders found it more difficult to cite specific cases in which they cut back or eliminated efforts that they found to be ineffective, redundant, or unsustainable. Before PropelNext, nearly 40 percent said that it was not common practice to use data to cut or eliminate ineffective efforts, while 31 percent were unable to assess. Two years after PropelNext, over 80 percent indicated that they could cite specific examples where they had both the data and the courage to make these types of tough decisions (Exhibit 13). Results from the staff survey corroborated this, with close to 72 percent indicating the practice was substantially or fully implemented. For example, one organization made the difficult decision to end a five-year partnership with a local school district when they recognized that there was neither mission alignment nor shared goals. Leadership explained that they arrived at this decision through the support of data and their program model. The director of learning stated, "We realized it wasn't a good fit but I would say it was the data and the program modeling that really got us over the line [to make that decision]."

Exhibit 13. Leaders can cite cases in which they have strategically cut back or eliminated efforts (n = 36)

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Organizational leaders and staff also demonstrated a shift in mindset relating to failure, seeing individual failures as learning opportunities rather than cause for judgment or punitive action. Forty-two percent of organizational leaders indicated that prior to PropelNext it was not common practice to acknowledge and use a "failure" to spark reflection, analysis, and improvement, while 33 percent were unable to assess. Post-PropelNext, a notable shift was observed with 75 percent of organizational leaders indicating that this practice had been substantially or fully implemented. Others talked about the notion of "failing fast" and acting upon information quickly rather than letting ineffective programs wither on the vine. A board member recalled rolling out new programming and, after several months, realized "that the numbers did not support our theory of change . . . There are real dollars at play, and you’ve got to understand where to best spend them to have impact on your mission." He went on to observe that often, prior to PropelNext, his

17 Responses are not shown for values under 5 percent.
organization didn’t view failures as learning opportunities and that they didn’t act in a swift and decisive manner to address ineffective efforts.

**Engaging the Board in Learning and Data-Driven Decision-Making**

Efforts to fully engage boards in learning and data-driven decision-making have met with more mixed results, with some organizations experiencing positive results and others describing their efforts as “a work in progress.” One-year post-PropelNext, seven of the twelve CEOs said that engaging the board and cultivating commitment for capacity building had been “easy” or “very easy.” Despite the varying levels of board engagement, there has been solid evidence that alumni boards are more embracing of a learning mindset and more inclined to use data to inform strategic discussions. Interviews with board members revealed that they are getting better information and data reports as well as more transparent, confident, and compelling rationale from executive leadership.

As part of the survey, organizational leaders were asked to reflect on the extent to which board meetings are data-informed, provide reports on results, and allow for in-depth discussions of major strategic issues. More than half (55 percent) of leaders indicated that before PropelNext this was uncommon practice, while 28 percent were unsure. Since completing PropelNext, there has been a clear shift with 86 percent of organizational leaders indicating that their boards regularly use data and results for strategic discussions (Exhibit 14).

A board member from one alumni organization explained, “The data and the information that we have at our disposal is second to none . . . and we, as a board, are using that data all the time as we think strategically about where this organization is going to go.” For example, the board and executive leadership used data to make a strategic decision to expand their target population to include opportunity youth ages 18–24. Reflecting on the decision, the executive director recalled, “We found out that there were 23,000 young people in [our service area] who have graduated high school and are underemployed or unemployed. Then, we did some homework to research how many of our own kids, who are in our program, become opportunity youth because they graduate high school and then they drop out of college. So, those two data points guided us to change our mission so that we’re now dealing with older youth to young adults. That was based on data.”

“Without having the data to look at where our gaps were and where we weren’t being effective, we wouldn’t have realized how much [case management] made a difference. Case management is expensive, but these kids have so many needs, that you’re not going to be successful and help them be successful if you don’t invest in that piece.”

—Board member
Exhibit 14. Board meetings are data-informed \((n = 36)\) \(^{18}\)

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Board meetings are data-informed, provide reports on results, and allow for in-depth discussions on major strategic issues.

Organizational leaders talked about the use of tools, frameworks, dashboards, and their theories of change to engage and generate dialogue. For example, one alumni organization developed a data dashboard to share with their organizational board on a quarterly basis. The dashboard displays indicators and outcomes that capture high-level progress in core areas like program implementation, staff satisfaction and retention, fundraising, and finances. The executive director explained that the dashboard provides board members with a snapshot of key indicators that help them to understand the organization’s progress and make key decisions, and also that the interactive nature of the dashboard allows for board members to dig deeper into data when they want to. The evaluation team was able to observe an iteration of this dashboard in use during a staff meeting, where it demonstrated its ability to look at changes over time and drive conversations about what was happening behind the data.

In addition to dashboards, several organizations pointed to the theory of change as a “good communication tool, both with our staff and internal audiences, and also with external audiences. It’s a real clear design of what we’re trying to do and what we’re trying to accomplish with the young people we work with.” Another organization discussed developing a learning agenda for the board to guide and moderate the amount of data that the board regularly reviews. “[We] reached the point in January of this year where they said, ‘too much data,’” a CEO shared, so the organization took a step back to determine what data was most useful and relevant, while still enhancing the board’s capacity to engage with and use data.

Interviews across alumni organizations suggest board members have been receiving and using more relevant data reports. Some board members specifically noted the change in the way staff discussed data, infusing more rigor and substance into board discussions. One board member noted that before PropelNext “reports weren’t very informative” and focused more on the minutia of individual students and stories. Since PropelNext, the board member observed, “Reports have become more detailed, more useful, and more informative to the board . . . They’re always talking about what’s working and what’s not. So there’s definitely been a change.” Another commented that new presentations from the staff to the board demonstrated the increased “analysis and rigor” that underlay the presentations.

\(^{18}\) Responses are not shown for values under 5 percent.
PropelNext Alumni Study Adaptive Leadership

PropelNext Exemplars: Adaptive Leadership in Action

Adaptive and reflective leaders, who create and continuously model cultures of learning and improvement, lead alumni organizations. Presented below are two alumni organizations that have benefitted from strong leadership teams skilled at inspiring vision and navigating change.

Based in Stamford, Connecticut, Domus operates educational, residential, and community-based programs to support vulnerable youth. The executive leaders at Domus regularly model reflection, transparency, and a culture of inquiry in their interactions with both staff and board. Leadership is transparent about its processes and accountability to a staff that also demonstrates a similar openness and emphasis on continuous improvement. Internal meetings and structures promote positive team dynamics and emphasize the value of ground-level data and knowledge. Both leadership and staff expressed a willingness to be self-critical as well as a genuine interest in using data for improvement. They also spoke extensively about understanding context and exploring how to further unpack data, especially when results fall short of expectations. Others talked about a “strengths-based rather than a deficits-based” approach to the work, as well as how they look at data. Leadership has created many opportunities and vehicles for staff to share suggestions and collectively develop solutions through cross-departmental workgroups that focus on such topics as race and equity, sanctuary, and staff wellness. Leaders were noted as being open and accessible, while providing clear direction about expectations and the importance of everyone sharing accountability. According to one staff member, “The culture of the organization is to ask for input before decisions are made.” With adaptive and responsive leadership, Domus has created a trusting environment marked by high staff retention, empowered teams, and collaborative interactions among staff.

Fresh Lifelines for Youth (FLY) runs legal education, leadership training, and one-on-one mentorship programs for justice-involved youth in several counties in Northern California. FLY has also made noteworthy strides in creating a supportive environment for an actively-engaged staff to advance their mission. FLY has developed an annual FLYght Plan development process, where at the end of each fiscal year they reflect on organizational progress, document what has gone well, and call out opportunities for improvement. They use this reflection to set goals and develop plans for the coming year. Each department and individual staff member creates a FLYght plan with their goals and deliverables, and each team shares their plan with the organization as a whole. FLY also builds in ongoing checkpoints, such as departmental report-outs at staff meetings, 360-reviews for staff, and monthly, data-informed one-pagers that track individual and departmental deliverables. These processes and structures provide staff both time and space to consider their own performance, goals, and strategies, as well as serving to facilitate conversations with management and leadership. By aligning these elements with departmental and organizational outcomes, FLY establishes a firm link between individual and organizational growth and performance. As one leader shared, “I’ve never been at any agency that dedicated this much time to reflection and priority setting on an annual basis.”
Talent Development

Investing in people and developing talent is yet another critical ingredient for building a learning organization and achieving better results.\(^{19}\) While not a primary focus of the PropelNext program, talent management continues to be a top priority for many PropelNext alumni. Nearly all alumni discussed the reality of losing staff that lacked the will, or ability, to adjust to new ways of doing business. While talent management will always require ongoing attention, organizational leaders felt PropelNext helped better equip them for managing these changes. One leader commented on the value and quality of the coaching, and specifically how the coaches’ ability to see “around the corners” helped their organization more effectively navigate talent-management issues. Grantees provided numerous examples of this shift to a more disciplined and people-focused management structure. This section highlights key practices and tangible examples of how alumni organizations have enhanced talent management efforts, including

- 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

Supporting and Aligning Talent with Organizational Needs

All alumni grantees shared ways in which they’ve become more intentional and strategic in their approach to developing high-performing teams. Many have assessed existing talent, identified gaps, and implemented efforts to align talent with organizational growth. Several organizations have elevated or created senior-level talent-management positions to focus on staff engagement, development, and coordination. Others have worked to strengthen middle management and develop more robust leadership teams. In addition, an increasing number of executive leaders have been thinking about ways to cultivate the next generation of leaders. One CEO reflected on efforts to foster strategic thinking beyond the executive leadership team, saying, “We’re moving in that direction. We haven’t done that yet, but I think, for us, that’s the next step... how do you begin to grow and build emergent leaders knowing that some of them will go off and take that elsewhere.”

For one organization, the creation of a talent management director has provided better support and guidance to frontline staff, including reducing caseloads. One leader explained, “We really wanted to give our line staff the first win, and that was a thoughtful strategic decision that we felt would immediately have the biggest impact for our clients.” A board member expressed a similar sentiment, in observing an important shift and increased attention from leaders on “running the business” to enabling people on the front lines to actually deliver services: “Certainly, 7 years ago or 10 years ago, everybody was all-hands-on-deck to deliver the services and relieve the trauma. There was really no one who was dedicated to enabling those people working on the front lines.”

Across the cohort, a common theme has been the shift from generalists “doing all

\(^{19}\) See https://ssir.org/talent_matters/entry/the_uncomfortable_truth_about_talent_development.
things for all people,” to the creation of staff roles and positions that are more focused and specialized. "When I joined [the organization], everyone was a site director,” noted a member of one organization’s leadership team. “Everyone on the whole program team was a site director. We all did everything. And so over time, everyone became a little bit more specialized.”

One executive director described how they restructured program delivery through both specialization and standardized practices: “We have case-management functions in every program, but they’re all going to do it the same way, same thing with work experience, same thing with employment specialists, same thing with outreach. Those are all learning-based restructurings.” According to the CEO of another organization, “The whole [PropelNext] process raised the bar for the entire organization . . . people were sort of paraprofessionals in the field [before] but now we've really come a long way in that regard” with team members focusing and deepening their skills and expertise in various areas that will benefit the organization and the youth it serves.

While alumni organizations recognized the performance benefits and efficiencies of this shift, challenges were still recent and relevant. “It's a blessing and a curse” one CEO said, “Back in the day we had such a great vibe—culturally there was this family-like dynamic. It was fun. So, we got people to join staff and we didn’t really have such clear demarcations around [positions]. People would just join to join, they would join wherever they could.” For some, the shift away from more free-flowing roles with ambiguous boundaries to specialization was welcomed, while for others it felt disruptive. Grantees have also grappled with the financial commitment required to take their talent management efforts to the next level. Executive leaders talked about the need to raise salaries and invest in middle management, with one observing, “That whole endeavor really made us look at where we are salary-wise and helped us identify who were some of the key positions within the organization that we needed to invest in.” According to one CEO, "The data has led us to invest in additional trainings. It's led us to invest in additional positions. It's challenged our thinking around how we do business.”

**Getting the Right People in the Right Seats**

Getting the “right people in the right seats” was a widely used phrase throughout the PropelNext program, but in practice it became a challenging and daunting task. As one leader put it, “When you have staff turnover, you have to start it all over again . . . There aren’t that many folks from four years ago that are still in the same roles or still doing the same thing.” While staff turnover was clearly disruptive, organizational leaders also viewed it as an opportunity. Many recounted efforts to carefully assess talent needs, create new positions, and rethink their organizational structure. "We did almost a complete re-tooling of what we had done before,” one leader reflected. Leaders have also had to navigate the anxiety of losing “long-term staff members that couldn’t adjust to those changes.” As another leader observed, “There was a lot of change for our organization that we probably did not anticipate before PropelNext.”

While not an easy process, the retrospective survey of organizational leaders revealed that they have made considerable progress in “getting the right people in the right seats.” Prior to PropelNext, there was ambivalence about the issue, with 36 percent unsure or unable to assess and 56 percent indicating substantial work still needing to be done. Two years post program, 86 percent indicated they had substantially or fully met this goal (Exhibit 15).
Exhibit 15. Leaders are confident they have “the right people in the right seats” (n = 36)\(^{20}\)

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Clearly, getting the right people in the right seats requires ongoing attention and effort; however, findings suggest alumni organizations have made considerable strides and are understanding the critical link between having “the right people” and organizational performance.

**Engaging and Empowering Staff**

Most organizational leaders acknowledged that prior to PropelNext they did not regularly or systematically solicit feedback from frontline staff to inform program or organizational improvements. In their thinking about this time period, the majority of leaders (61 percent) found it difficult to cite concrete examples of learning or changes that stemmed from ideas generated by frontline staff, while approximately 30 percent were unsure or unable to assess their situation. Two years after program completion, 84 percent indicated that they had substantially or fully met that practice, suggesting a noteworthy shift in staff engagement around continuous improvement (Exhibit 16). During focus groups, frontline staff surfaced several examples of this practice in action. For example, staff from one organization disagreed with lofty program goals in which 100 percent of participants were expected to achieve specific benchmarks. After discussions with leadership, it was agreed that 80 percent was a more realistic and manageable goal, given the population served by the program.

Exhibit 16. More than 80 percent of leaders can cite examples of learning and/or changes that stemmed from ideas from frontline staff (n = 36)

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<th>Prior to June 2012</th>
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<tr>
<td>11%</td>
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\(^{20}\) Responses are not shown for values under 5 percent.
Focus groups with frontline staff indicated that they felt heard and staff readily cited examples of leadership acting upon and implementing their suggestions. Several organizations implemented staff surveys to gather input on a broad range of organizational topics. One annually uses the Gallup 12, a simple but widely-adopted tool developed by Gallup, to assess staff engagement and satisfaction by using survey items that could also predict employee and group performance. One leader reflected, "That's a practice now that I would say everybody takes really seriously across the entire organization." They spent considerable time as a management team looking at that data and developing a plan of action. A staff member at another organization reflected on their annual staff survey stating, "They [senior staff] really take the answers from the survey and try and see what changes could be made."

Others mentioned the formation of cross-departmental workgroups and more frequent staff retreats. One leader commented that on retreats "we have a diversity of all the different departments within the organization and different programs so that we can hear other perspectives. And there is always someone recording it back to senior management, for them to review and talk about." Staff from another organization talked enthusiastically about their involvement in topic-specific workgroups focused on race, sanctuary, and trauma-informed care, as well as organizational issues like staff wellness.

Staff shared that organizational leaders have also been open to feedback on their performance and nearly all organizations talked about fluid communication with supervisors and having had reciprocal feedback loops. One staff member explained, "We get evaluated, but we get to give feedback [to senior staff] about our supervisor... what's helping, what's not helping, and what more we need in terms of supervision."

Staff development and empowerment has been motivational and catalyzing for many frontline workers at alumni organizations. One staff member reflected on the importance of a supportive organizational culture that empowers and invests in staff: "I'm a millennial, and we don't stay at jobs that long. This is a career for me, not just a job. Not many places can say they’ve had people here for 23, 26, or 16 years." One organization encouraged frontline staff to take the lead in presenting data to their peers, with team leaders creating structure and setting the correct tone. A leader describing the process said, "It wasn't like, here's your impact data, you did a good job or you didn't. It was... what can we learn about why some classes are outperforming other classrooms?"

Alumni organizations also acknowledged challenges to staff engagement and management of the natural anxiety around data use and organizational change. "There is always push-back from the line staff around changes," one leader shared, "and there are those who will say, 'I liked how it was before.'" Other leaders talked about anxiety at all levels of the organization, including seasoned staff who, at times, struggled to adapt to new responsibilities and requirements. One leader recalled having to tell his tenured managers that "you’re new at this, and you have to go through the learning curve... we can learn about why some classes are outperforming other classrooms."

**Raising the Bar and Clarifying Performance Expectations**

Alumni leaders noted increased expectations, accountability, and standards of excellence for all staff across their organizations. This has required managers to more effectively define and communicate performance expectations. Prior to PropelNext, over 56 percent of organizational leaders expressed that standards of excellence were not clearly articulated or communicated to staff, while approximately 30 percent were either not sure or unable to assess. Post-

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21 See [https://q12.gallup.com/Public/en-us/Features](https://q12.gallup.com/Public/en-us/Features)
PropelNext Alumni Study Talent Development

PropelNext, substantially more organizational leaders (81 percent) said managers either fully or substantially implemented this practice (Exhibit 17).

**Exhibit 17. Managers clearly communicate their standards of excellence (n = 36)**

![Chart showing the percentage of managers communicating their standards of excellence prior to June 2012 vs. now.]

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Expectations for managers have also increased, with one CEO noting, “Anyone who manages anyone here has to be able to show concrete evidence of ability and a history of using data to learn and improve performance in some way or another.” Across the cohort, staff members were also surveyed to assess the extent to which expectations and standards of excellence were clearly communicated. Similar to responses from the leadership teams, the overwhelming majority (83 percent) of staff indicated that this practice had been substantially or fully met. Staff also indicated receiving regular and meaningful feedback on their performance. In fact, approximately 77 percent of staff agreed or strongly agreed that managers regularly conducted performance reviews with staff and managers where they mutually-define strengths and opportunities for improvement.

Interviews with organizational leaders also revealed some of the inherent challenges of raising the bar and efforts to recruit qualified staff. Several leaders mentioned elevating salaries to attract and retain talent, as well as reaching higher standards in the recruitment process. Other leaders discussed the challenges of managing staff expectations and clarifying pathways for growth when performance standards are high. "For better or for worse, we've gotten a lot more strict about what it means to manage a person, and that a manager title doesn't just get thrown at you because you've been here a long time or because you want it,” shared a program director. "You have to meet all of these criteria to show us that you’re ready for that before you get the title,” they continued. This wasn't always the case in the past.

**Institutionalizing New Recruitment and Hiring Practices**

With keener understanding of the skills and attributes needed to strengthen performance and quality, nearly all grantees talked about changes they made to their recruitment, hiring, and onboarding processes. Several grantees said they did more intentional screening of candidates to assess their learning orientation by asking different questions and probing for the candidate’s history and experience working with data. Alumni organizations also discussed adapting new employee orientation practices, with one leader noting that all new employees “have to read our theory of change, and then after they read it, part of our orientation is to go deeper with what does that mean.” The leader observed how new hires had appreciated the clarity, with one stating, "It's so clear what I’m supposed to do with my time, what the expectations are.”

Across the board, organizations expressed that finding qualified candidates had become more challenging, particularly for organizations based in regions where the
cost of living is high. One leader explained, "As we replace staff, we're looking for more experience or more education and so forth. Sometimes we get to the final rounds [of a hiring process], and people walk away for money. We can't match it because we're gonna throw the whole compensation system out of whack. So that's the cost of quality."

In addition to shifts in hiring practices, some organizations noted ways they've strengthened orientation and onboarding for new employees. One organization revamped their approach to onboarding by adding a peer-learning component. A staff member noted, "All new staff have to job-shadow before they go on their own. And that orientation is very challenging when you're not in the traditional nine-to-five office situation. They get a lot of vicarious learning from other workers." At the same organization, based on lessons previously learned, there was also closer oversight and guidance during the initial probationary phase, as their representative noted, "You have to replicate before you can innovate. We are really starting to pay attention to it and starting to think about what that means."
PropelNext Alumni Study  Talent Development

PropelNext Exemplars:
Practices That Invest in People

There is no doubt that alumni organizations have grown and strengthened their ability to manage staff. However, while all alumni organizations have taken unique approaches to talent management, the following two organizations have paid special attention to ways they can enhance their talent management efforts.

Youth Opportunities Unlimited (Y.O.U), based in Cleveland, Ohio, has spent the last two years overhauling their approach to talent management, and this initiative was outlined as a clear objective in their strategic plan for 2016–2019. Some of the milestones laid out in their strategic plan include developing and implementing a comprehensive talent management plan, ensuring all staff have put professional development plans in place, and developing competency models for all Y.O.U positions.

Beyond their strategic plan, Y.O.U also created and filled a new position to lead efforts in integrating talent management and organizational performance. With this new leader in place, Y.O.U has implemented a new performance review process, institutionalized monthly meetings for program staff and leaders, and added one new program director position. We heard from staff members—many with a long tenure at Y.O.U—who are excited by leadership’s new approach to talent management. One staff member shared, “Our whole [performance] evaluation is being totally revamped. We’re starting a brand-new process, it’s being rolled out in pieces and it’s really exciting because it’s competency based . . . It’s equitable and it’s just a good plan.” A different staff member lauded the widespread implementation of professional development plans, “All of us are working on a professional development plan. It forces our managers to help us develop that, create it, help us with training, help to push us, how to get us to the next level.”

The National Indian Youth Leadership Project (NIYLP), headquartered in Albuquerque, New Mexico, seeks to develop leadership among Native American youth through Native culture, values, mentorship, and experiential education programming. Founded in 1985, NIYLP has provided direct-service programming throughout New Mexico, as well as in other regions of the United States, Canada, and Europe. This commitment to service and knowledge sharing is mirrored in the reflective and supportive peer support between NIYLP leadership and staff. Often working with youth in remote and dispersed locations, NIYLP staff and leadership congregate on a regular basis to share updates and effective practices, as well as to problem-solve together. Leadership has fostered a supportive, reflective, and empowering environment where staff is encouraged to use the same collaborative and strengths-based approach they employ with youth in their programs with each other. Through this intentional practice of listening and sharing, a small but mighty team that serves high-risk youth has been able to overcome resource limitations and geographic barriers to collaborate, by creating a valuable space to support each other, engage in case management, and cross-share their diverse areas of training and expertise. As the executive director shared, “We sit down and reflect and talk about what happened and help them draw the meaning out of them . . . when you rappel off a cliff, and then, if you don’t take the time to work through that with them, you’re missing a big learning opportunity. We practice what we preach.”
Organizational Integration and Alignment

Through PropelNext, organizations receive guidance to help spread learning and institutionalize continuous improvement practices across their agencies. Organizations are encouraged to extend the framework to other programs and use data, research, and analysis to inform organizational strategy and operational and resource decisions. Organizations are also encouraged to explore ways to create greater alignment, collaboration, and integration across programs, departments, and job functions. This type of organizational change takes time and intention, but alumni organizations shared a variety of ways that they have embedded performance management practices into their organizational DNA. Evidence and noteworthy findings related to integration and alignment include:

- Using data to align programs and major initiatives with organizational strategy
- Fostering cross-departmental learning and quality-improvement teams
- Systematically collecting and using data across departments and functions

Using Data to Align Programs and Major Initiatives with Organizational Mission and Strategy

Most alumni organizations have developed data-driven strategic plans and/or organizational theories of change to align, organize, and guide their priorities over the next several years. At least seven alumni organizations reported having a strategic plan and half of the organizations had a high-level theory of change in place that informs major organizational initiatives. The evaluation team reviewed plans ranging in approach and level of detail. Most of these plans align and map out vision, goals, priorities, and strategies for a three-to-five-year period. The plans have had varying degrees of formality, with some organizations developing brief, high-level documents intended for board and leadership, while others developed detailed plans that exceed 30 pages and function primarily as roadmaps and accountability tools. One director shared how their overarching theory of change helped to clarify that “each component has a very clear chain of events, which fits into the broader narrative.” While these high-level plans have taken various forms, interviews with executives and board leaders suggest that organizations have been using trend data, research, and analysis to set challenging and realistic goals.

Although alumni organizations’ strategic plans were diverse in approach and content, almost all leaders talked about the value of the planning process and the importance of staff engagement to determine priorities and coalesce around a shared vision. One organization engaged staff from across the agency: “It gave us an opportunity to both communicate and evolve a cross-section of the staff in some key decision points moving forward . . . it was comprised of folks from advancement, training, instructors, case managers, employment folks [and] finance.” A different organization shared that they were able to create a clear and cohesive vision that resonated across all departments and functions “from board to line staff.”

“We developed an organizational theory of change, an organizational model of what we believe as an organization, and I think a large part of that is due to all the work that we were able to do with PropelNext.”

—Alumni leader
Organizational leaders also embraced the idea that their strategic plan or theory of change is a living document and not something meant to “gather dust on a shelf.” As one noted, “The strategic plan is not a moment in time where we all gathered around, did this exercise, and then declared success.” Instead, this organization ensures leaders review their strategic plan with their board once a quarter so that “it’s being tracked and it’s being updated.” While organizational leaders described strategic plans and high-level theories of change as seminal documents, few staff members were able to speak to the ways they use them in their day-to-day work. One program director acknowledged that while strategic documents were foundational for leadership, for frontline staff, they were “like the constitution or declaration of independence. Most Americans don’t look at it every day, but it’s guiding a lot of key concepts.”

While many staff members may not readily use the theory of change as a tool on a daily basis, results from the retrospective leadership survey suggest that more staff understood how it guides programmatic or organizational work. Specifically, over two-thirds of leaders reported that, prior to PropelNext, this practice had not been started or had been only partially met. However, post-PropelNext, 70 percent said this practice was substantially or fully met (Exhibit 18). In focus groups with frontline staff participants were able to articulate the core components of their theory of change. Even if they didn’t reference the tool on a daily basis, the majority of staff was able to share how their day-to-day work contributed to its execution. As one staff member put it, “I definitely received a copy [of the theory of change] when I started, and then [I] reviewed it with my supervisor at the time, and overall, I would say that the theory of change is well integrated into our culture here . . . I think we all have a really deep understanding of it, even if we couldn’t regurgitate the phrasing for the model.”

Exhibit 18. Organizations have integrated their theory of change into their organizational DNA (n = 36)\textsuperscript{22}

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<tr>
<td>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</td>
<td>28%</td>
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| 42% | 28% | 30% |

\[22\] Responses are not shown for values under 5 percent.

Fostering Cross-Departmental Learning and Quality-Improvement Teams

Some alumni have created cross-functional teams to spearhead learning and continuous-improvement efforts across their organization, with the goal of improving collaboration and connection across silos. For example, one organization institutionalized a team with the role “to create systems and structures for the entire organization [and] to implement continuous improvement practices across the organization.” With the support of this team, the organization chose to restructure how they run their staff meetings to ensure meetings are “driven by continuous improvement and learning, data, and progress to goals.” A different organization has a Theory of Change (TOC) Committee that supports the development of an organizational-level theory of change and is in charge of spearheading continuous learning efforts throughout the organization. The TOC
committee "is made up of staff all over the agency" with "representatives from every single program" who work to expand data practices, share learnings, and drive other learning-related activities.

At another alumni organization, leadership took inventory of their different department’s practices and processes. By closely inspecting how their different departments functioned day-to-day they were able to identify the areas that still needed to build infrastructure for learning and continuous improvement. One leader said that previously "there was no accountability" across departments, and that leadership had to convey the message that continuous-improvement practices were "not just [for] programs . . . it has to hit every single group."

**Systematically Collecting and Using Data Across Functions and Departments**

Since PropelNext, alumni have improved their ability to systematically use data across programs and departments. Focus groups, interviews, and observations of team meetings provided evidence of widespread data use. Of the 12 program meetings observed during alumni site visits, nine were focused on data discussions. Leaders and program staff were observed referencing data for learning, often with support data reports and presentations. At one meeting, leadership used action-oriented discussion questions to promote troubleshooting and decision-making among staff. Some question prompts included, What does this data mean for my role?, Does my hypothesis lead to a clear action?, and Is there other evidence I need to make a decision?

The use of data to drive performance has extended beyond programs to other departments and functions. For example, one leadership team committed to having a data presentation or data review at every organizational meeting. A different organization ensured that measurable goal-setting and tracking occurred "not just at the board level, but at the individual performance review level" and even with "development people." An organizational partner observed, "They just have a ton of processes in place in the organization around generating reports—having conversations, doing annual planning—all rooted in data, and tracking against the learning agenda that they have."

There is also evidence that data systems have been leveraged beyond programs. One organization recently adopted a new data system to overhaul their talent and performance management process by using Cornerstone on Demand. The system incorporates goals for every individual in the organization, which "increases or develops the muscle of using data to measure performance, because they have to be specific and measurable." Other organizational partners shared how their own data system’s reports help not only in gauging program effectiveness but also in driving improvement in all facets of their organization. Before PropelNext, 59 percent of organizational leaders said that this practice was not started or partially met, with 30 percent unable to assess. Since PropelNext there has been a shift, with 84 percent of leaders reporting that their organization has substantially or fully implemented this practice (Exhibit 19).
Exhibit 19. For many alumni, their data system supports all facets of their organization ($n = 36$)\textsuperscript{23}

Prior to June 2012

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Data system provides reports to help alumni gauge program-effectiveness and drive improvements in all facets of their organization

Now

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\textsuperscript{23} Responses are not shown for values under 5 percent.
PropelNext Exemplars: Extending Learning and Improvement across an Organization

Alumni organizations are actively implementing PropelNext learnings across various programs, departments, and functions in their organization. This section highlights two organizations that are doing this particularly well through unique practices of their own.

**Colorado Youth for a Change** (CYC) provides comprehensive reengagement services to youth in 12 school districts throughout the state of Colorado. Through their programming, CYC aims to engage students, reduce the dropout rate, and help students to graduate high school on time. Staff turnover is a common barrier to institutionalizing PropelNext learnings across an organization, and a barrier that CYC has experienced. As one CYC leader put it, “It takes a long time to build those kinds of things into the bones of an organization when people leave.” However, even while several staff members left CYC after PropelNext, leadership made intentional efforts to ensure that learning and continuous improvement is still being institutionalized across their team. With the support of a PropelNext coach, CYC coordinated a theory of change “refresher” session for both new and old staff. The refresher course reviewed the definition and purpose of a theory of change, along with an overview of the development of CYC’s theory of change. This workshop is a perfect example of how an organization can continue to infuse learning across an organization, even in the midst of change. In the words of one CYC leader, “It’s helpful to have that kind of re-injection every once in a while.”

Located in San Francisco, **New Door Ventures** provides employment opportunities, skills training and education, and support services to transitional-age youth in the Bay Area, where approximately 80,000 youth experience disconnection from education and employment. Staff and leadership at New Door Ventures embrace taking risks and trying new approaches to youth service delivery, notions informed by the use of data and youth feedback. Furthermore, these data discussions have informed the expansion of the program model and theory of change to include education programming. Youth voices are central to implementation of programming at New Door Ventures, and staff and leadership have invested in gathering real-time feedback and systematic feedback from youth through Listen for Good. The commitment goes beyond surveys with the Alumni Leadership Council, a group of program graduates that systematically gather feedback from peers and advising staff on program improvements. As a result of these feedback loops, New Door Ventures has made many programmatic changes to better serve Bay Area youth. A staff member noted how this feedback loop allows “time to potentially make a change before youth leave the program [rather than change implementation] once they [are] already gone, so they [won’t] know, or see the changes, or know that their survey was meaningful.” Additionally, New Door Ventures has created an Insight Team, a cross-functional team that supports a culture of learning and analyzes data collected from across the organization to assess program effectiveness and recommend improvements.
Sustainability and Managing Change

While PropelNext is not a financial capacity-building program, the underlying focus on performance management has clear implications for program expansion, fund development, external communications, and strategic partnerships. Navigating growth has been both a key achievement and challenge, and has manifested in various ways. Not surprisingly, the trends highlighted in this report have translated into higher costs and bigger budgets with the majority of alumni organizations (10 out of 12) experiencing growth in their operating budgets. In a few cases the growth has been substantial. In this section, we explore several key themes related to financial health and sustainability, as well as some of the inherent challenges of managing growth. Evidence and noteworthy findings related to financial health and sustainability include:

- Retaining and attracting new sources of funding
- Strengthening relationships with core funders
- Expanding programs and serving more youth
- Strengthening strategic partnerships and credibility as field leaders
- Communicating a more compelling story of impact

Retaining and Attracting New Sources of Funding

Findings from the retrospective survey reveal most alumni organizations have been successful in securing new sources of funding since completing PropelNext. As shown in Exhibit 20, less than half of leaders (39 percent) reported that their organization had substantially or fully met this goal before PropelNext, compared to 81 percent in 2017, post-PropelNext. A leader from one organization’s development team affirmed this trend when he explained, “We probably have a 95 percent success rate on all the grants that we write. One of the reasons is because we have the data to really prove what we say we’re going to prove.”

Exhibit 20. Over three-quarters of alumni have secured funding from new sources (n = 36)24

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<td>Successful at securing funding from new sources over the past two years</td>
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<tr>
<td>Successful at securing funding from new sources over the past two years</td>
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Several organizations attributed their successes to their abilities to more clearly communicate their missions, their roadmaps, and their results using data. Some organizations have expanded beyond local funders and are attempting to tap into

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24 Responses are not shown for values under 5 percent.

“We’re continuing to attract, what I would consider [to be], pretty sophisticated money because of the data we can talk about.”

—Alumni leader
larger, national funding sources. One organization applied for federal funding for the first time, and while they were not awarded the grant, the leader reflected positively on the experience and said that they felt “better prepared than ever to go after those opportunities . . . [and] fully confident we will get there.” Several alumni said that their relationship with EMCF has also given them more credibility and the confidence to pursue funding opportunities that they may not have explored prior to PropelNext.

Organizations also reported an increased ability to retain funding from existing funders. The retrospective survey revealed that 48 percent of leaders said their organization had substantially or fully met this goal prior to PropelNext compared to 89 percent of leaders in 2017, post-PropelNext (Exhibit 21). One noted, “We’ve gotten some increased investments from major funders, and a lot of that has to do with the information that we have.”

**Exhibit 21. Over three-quarters of alumni have retained funding from existing funders (n = 36)**

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- Fully met
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**Strengthening Relationships with Core Funders**

Conversations with alumni and their funders revealed an interesting trend towards more transparent, honest, and collaborative funder–grantee relationships. Leaders of alumni organizations shared how their interactions with funders have been more open and how they are more likely to engage in difficult conversations about funder expectations, reporting requirements, and the full cost of providing high-quality programming. Prior to PropelNext, some alumni said that they were more inclined to let funders steer conversations around planning and implementation of programs. One leader said that they used to “do whatever the funder thinks is best,” but post-PropelNext, the leader continued, they are more inclined to push back with funders and have deeper conversations about their target population, goals, and outcomes.

Funders described their interactions with alumni organizations as mutually beneficial, transparent, honest, and as one funder described, “a tremendous learning experience.” Another funder, one new to the field of workforce development, shared that their grantee has “been unusually generous in helping us understand the environment. They’ve invested time in really helping us to understand, and I think it’s a very smart organization that does that.”

Both leaders and funders observed that alumni were communicating more transparently and having more honest conversations about data, learning, and results. One organization noted how there has been a greater willingness to “share the hard stuff,” an attribute that funders found refreshing. One funder explained their perspective, “As a funder, I feel like organizations are always inviting me into
The dining room—and they have their best china and silver and crystal out, and the house is impeccably clean. And I just want to go into the kitchen and have a cup of coffee.” Funders acknowledged how often power dynamics get in the way of an organization’s ability to remain open and transparent about what’s working and what’s not. One funder reported, “It’s a little scary to show your hand to your funders, but they really know how to make it work, and I think that it’s because they have a really good handle on what’s going on in their organization, and they’re not guessing at it. They understand what they’re trying to achieve.”

The retrospective survey provided additional evidence of this shift. When asked about how much they engaged in constructive dialogue with funders about their data requirement, just 20 percent of leaders said that it was a substantially or fully implemented practice prior to PropelNext. Post-PropelNext that number climbed to 72 percent (Exhibit 22).

**Exhibit 22.** Alumni are increasingly engaging in constructive dialogue with funders about data requirements ($n = 36$)

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Engages in constructive dialogue with funders about their data requirements to ensure that the data we collect is meaningful both to the organization and our funder

The trend of increasing efforts to strengthen funder-grantee relationships continues to grow in the sector. Accordingly, PropelNext alumni pointed to their increased clarity and confidence using data, discussion of outcomes, and focus on results. One leader noted, “We’ve shifted the conversation with funders about investing in the organization, investing in our youth, versus just giving grants and funds. We’re able to talk about . . . what your investment produces.” Several organizational leaders noted that educating other funders and “influencing the funding community” was both an achievement and an ongoing challenge.

**Expanding Programs and Serving More Youth**

Since completing PropelNext, 10 out of 12 organizations said they are serving more youth, while seven have expanded to new sites. The majority of funders, board members, and partners cited expansion into new places and serving more youth as among their most noteworthy achievements during the past three-to-five years. According to one partner, “They’ve changed from a very place-based organization to one that is scaling in the region.”

Organizations have credited access to new funding, as well as their capacity for data and learning, as the impetus for their growth and expansion. One leader pointed to their experience in PropelNext and explained, “Our expansion is directly related to the work with PropelNext, because it enabled us to sit back, really focus on who we are and what we do, and then that gave us the confidence and true sense that we had the expertise needed to move into another site.” Another organization was invited to become the fiscal host for a new program in their region and attributed their knowledge of evidence-based interventions and the
capacity to implement with fidelity as the two primary reasons for their selection. The grant’s funder affirmed how they “really needed a partner that could implement with fidelity.”

While there are challenges that come with expansion, several organizations reported seeing similar and, in some cases, better youth outcomes as they scaled. One leader explained, “We’re growing, and our outcomes and our quality of work is staying the same or getting better.” A different leader underscored the importance of carefully tracking and assessing data to ensure quality and that outcomes remain high as they scale their programs. One organization experienced a minor decline after rapid growth and decided to slow expansion until they got a better grasp on the situation. The organization’s funder commented on the decision, noting that “they’re still hoping to grow, but I think they’re recognizing that their academic results . . . weren’t where they wanted them to be. They needed to earn the right to grow, if you will.”

Some organizations expressed concern about their ability to financially sustain their growth. Despite an overall uptick in funding, some organizations have hit a wall and struggled to attract larger sources of regional or national funding due to their geographic focus and/or lack of rigorous external evaluations. As an organizational partner put it, they are “too big or too mature for local funders, but not big enough for national funders.” Organizations that depend on public sector funding have also struggled and, given the current policy environment, things seem likely to get worse before they get better. One commented, “The budget for the state over the last five years has almost been flat funding. Maybe one percent or two percent, but essentially, the costs of the program are going up, but the funding isn’t keeping pace with it.”

**Strengthening Strategic Partnerships and Credibility as Field Leaders**

Alumni organizations are increasingly recognized as credible, data-driven, and results-focused leaders among funders, partners, and peer organizations. A board member observed, “They now have the data to back up what they say, and it makes a big difference, and makes it easier to bring other partners to the table.” The executive director of another organization reflected, “We can now prove all of the things that we’re claiming. We are becoming more respected in the community and as a leader.”

Many alumni organizations have expanded their partnerships and reported improvement in the overall quality of those relationships. Half of the CEOs said that it has been “easy” or “very easy” to engage external partners (e.g., schools) in their new way of running youth-development programs. Several organizations mentioned how their leadership roles in collaboratives and in pursuing funding have been part of collective impact efforts. One leader shared how the PropelNext framework has helped to shape their work with partners: “We’ve been working together only five months, but the whole PropelNext framework [has been] really helpful and, at a minimum, [it’s been] creating a common agenda and common definitions for that collective impact group. Is it going to be better outcomes? Time will tell.”

During interviews with alumni funders and partners, alumni organizations were described as transparent, honest, and committed to strengthening not only their organization, but also work in the field of youth development. Alumni organizations were also applauded for their willingness to share learnings and strategies with the wider community, generating trust and goodwill with community partners. One partner shared, “[We] go to them for feedback because we know we can get honest and great feedback from their team.” A funder of another organization observed how a genuine commitment to continuous improvement has positioned the organization to partner with others: “They’re not looking for awards or

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“Our PropelNext experience contributed significantly to our ability to expand into a new community. Not from a resources standpoint, but from a standpoint of feeling confident that we could continue to deliver services and not undermine quality [or] impact.”

—Alumni leader

“Institutional partners, foundational supporters in particular, who ask for different level of detail . . . they are probably seeing much better data presented in much clearer ways.”

—Alumni leader

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Alumni organizations recognize they can’t move the needle and improve outcomes on a larger scale without having an intentional strategy for partnerships. At least one organization made “deepening relationships with like-minded organizations” part of their strategic plan and recently joined a “collective of local organizations that all have the same client base.” Some CEOs have been invited to contribute to affinity groups and to attend speaking engagements. Others have played prominent lead roles in learning-and-evaluation discussions, as part of collaboratives and community-partnership efforts. One CEO explained, “We are known in the community for knowing how to do performance management.” Funders and community partners believe alumni organizations have brought leadership, structure, and experience using data to collaborative efforts. As one funder observed, they are “not just a direct service provider, but a community collaborator and convener.”

Communicating a More Compelling Story of Impact

Since PropelNext, alumni have increased their capacity to use data to communicate their impact and tell a more compelling story. Alumni communication materials, newsletters, and websites have evolved and improved, and often include dynamic visuals and charts that clearly show their goals, strategies, and outcomes. For example, one organization described how they have improved their written materials “through good graphics [and] visuals that really speak to what we’re trying to accomplish.”

Across the alumni organizations, storytelling and communications have shifted from “feel good stories” to stories “with impact.” Several funders and board members noted that there has been more analytical rigor behind alumni’s messaging and data-informed story telling. One board member noted, “Prior to 2012, most of the communication was anecdotal and specific to individual experience [but now] they are really able to speak more to the full impact of a program.” A board member from a different organization observed that communication materials were no longer just “pull at your heart strings” but instead were “much more data and results-driven.”

Although alumni have seen their external communications improve over the last several years, room for growth remains. A few funders and board members have expressed belief that alumni could improve their ability to produce “concise” and “crisp” messaging that resonates with a variety of audiences. For multi-service organizations, the ability to clearly state the “common thread” across their programming has been important to ensure that audiences who don’t “live and breathe their work” would still be able to easily understand their goals and strategy. As one funder observed, “Their work is complex . . . and I think where they’ve struggled is really simplifying it, which can be hard to do.” An alumni board member concurred saying, “They recognized that they’ve mastered their programming and data and now have to frankly tell the world what they’re doing a little more forcefully.” Alumni leaders also acknowledged that there is room for improvement. One leader explained, “Reporting for compliance, reporting for grants management, that’s such a part of our culture. Reporting for learning has been a much more robust investment that we’ve made in our development. I think being able to tell a story in a compelling way is where we have to go next.”

“Alumni board member

“I see more collaboration. I see more sharing of information and I think that’s because they understand the value of the data . . . it can only get better if they make that part of their communication with their peer organizations.”

“We used to just tell heart-wrenching stories about poor kids who were abandoned . . . now we’re saying ‘this is what we’ve accomplished . . . here’s the outcomes we produced.’”

—Alumni leader
PropelNext Exemplars: Strategies for Long-Term Sustainability

As alumni organizations navigate life post-PropelNext, many have faced roadblocks to financial health and organizational growth. However, a few organizations have grown programming and funding strategically, with apparent ease. This section shares the stories of two such organizations.

Based in Santa Ana, California, Hope Builders provides hands-on job training and life-skills supports for disadvantaged youth. Like several other alumni, Hope Builders has experienced rapid growth since PropelNext, doubling its budget and expanding its services into a second city in Orange County. With that successful expansion underway, the organization has begun to think critically and carefully about how to best position itself for long-term sustainability. A key part of their process has included understanding and explaining their place in the field. During PropelNext, leaders were able to explore research and best practices, and identify areas in which they could strengthen their systems. Through this process, leaders also recognized several areas where they already had expertise and excelled, a recognition that gave them the confidence to expand their work and stake out a position as a leader in their field. They have also embraced new approaches to communication with external stakeholders using dashboards and impact reports, made the thoughtful decision to change their name to strengthen their brand while maintaining ties to their history, and crafted a clear and compelling message. As one funder shared, “The way they positioned it in both the emotional and the economic argument is effective.”

New Pathways offers independent living, workforce development, and life-skills programs for foster youth and other disconnected youth in and around Baltimore County, Maryland. Since completing PropelNext, New Pathways has been thoughtful, reflective, and strategic in how to best position the organization for long-term sustainability. After targeting its services to youth aging out of Maryland’s foster care system for most of its forty-year history, New Pathways widened its reach to include all disconnected youth ages 16–25. As a result, it has doubled the number of youth it serves annually and has been viewed as a valuable partner. At the request of county government, the organization has expanded services and facilities into a new county to reach even more youth needing support. In addition, its innovative independent living and workforce development models drew the attention of a well-established multi-state family-services organization, leading to an upcoming merger that will allow New Pathways to leverage its impact and access additional resources. By expanding its codified model to additional groups and engaging new partners with complementary strengths, New Pathways is working to build a sustainable model for its future.
Concluding Remarks and Considerations

The PropelNext emphasis on data-driven, high-quality programs has created fertile ground for a culture of learning and continuous improvement across grantee organizations. Two years post-PropelNext, organizations have continued to build muscle and core competencies for performance management, resulting in notable shifts in organizational practices, behaviors, processes, and culture.

This retrospective study found evidence and indicators of progress on the journey to high performance, and highlights the ripple effect of PropelNext’s capacity-building strategies beyond program design and implementation. It also captures key challenges and facilitators of progress. As pioneers in “uncharted territory,” alumni reflected on the PropelNext supports that were most impactful, as well as what could be refined to improve results. In this section, we summarize key takeaways and considerations for the future.

Results and Key Takeaways

- **Well-designed and well-implemented programs and strategies:** Organizations have codified program models based on research with clear target populations, intended outcomes, dosage, and duration. Two years post-PropelNext, 83 percent of leaders indicated that the practice of developing codified program models has been substantially or fully met. Organizations have also improved and sustained implementation fidelity by strengthening guidelines, engaging staff in data use, and providing more intensive supervision.

- **Systems, infrastructure, and capacity to support data use:** All twelve organizations are using more robust data systems, giving frontline staff access to data to help them strengthen program delivery for at-risk youth. Staff members have increased their capacity and confidence to use and discuss data, and to think critically about the relevance and utility of data. Two years post-PropelNext, 11 out of 12 organizations have at least one or more people on staff dedicated to evaluation and supporting learning across the organization.

- **Adaptive executive leadership that inspires and models a learning culture:** Organizational leaders regularly share results and engage people, at all levels, to reflect on data and explore opportunities for improvement. Before PropelNext, these were inconsistently employed practices and leaders acknowledged often having used intuition rather than data to make operational and strategic decisions. Two years post-PropelNext, both leaders and staff indicated notable shifts in these behaviors, as well as experiencing an openness to learning from mistakes and making disciplined decisions based on data.

- **Talent and expectations aligned with organizational growth and high performance:** Organizations have made important strides to develop talent and align people to meet organizational needs and higher standards of performance. Two years post-PropelNext, 86 percent of leaders indicated that they made substantial progress getting the “right people in the right seats,” and 81 percent said the practice of
communicating standards of excellence and accountability was substantially or fully implemented. Focus groups with staff provided further evidence of intentional strategies to engage staff and foster an environment that values learning, reflection, and continuous improvement.

- **Intentional efforts to align and integrate learning and data-driven decision-making across the organization:** Organizations highlighted a variety of mechanisms and processes to promote alignment, including organizational theories of change and strategic plans driven by research, analysis, and stakeholder engagement. They have broken down silos through cross-agency teams focused on quality-improvement and learning, as well as by using data, discipline, and structured processes for making operational and strategic decisions.

- **Efforts to financially sustain program expansion, strengthen partnerships, and communicate impact:** Most organizations are serving more youth and have expanded to new sites while maintaining both fidelity and improved outcomes for youth. The majority experienced budgetary growth while also expressing concerns about covering the full cost of delivering high-quality programs. Funders and grantees alike noted improvements in the quality of funder-grantee relationships, as well as the quality of interactions with institutional and community partners. While still an opportunity for improvement, organizations have been telling a more compelling story of their impact on the lives of disadvantaged youth.

**Most Impactful Components of PropelNext**

The combination of intensive supports is part of what makes PropelNext a powerful program, but according to alumni, high-caliber coaching and cohort-based peer-learning have been most critical for propelling their organizations to the next level. Given EMCF’s commitment to testing and learning, alumni feedback has already been incorporated and used to shape strategies and content for future cohorts. We summarize additional and recent feedback below.

- **Customized organizational coaching is a game changer:** Customized coaching was consistently noted as the most valuable aspect of PropelNext. Specifically, alumni called attention to the high caliber of coaching and the fresh perspective, honest candor, and ability of coaches to anticipate the blind spots and challenges that organizations may encounter down the road. One leader noted, “Every minute I ever spent at a convening or with a coach was extremely valuable.” Another commented on the unvarnished advice from their coach, “I really appreciated that she’ll tell you how it is. And you do with it what you want . . . but she’s gonna tell you.” Many alumni have maintained contact with their coaches and have sought advice, refresher workshops, and support during organizational transitions.

- **The cohort-based peer-learning model contributes to deep learning, collaboration, and field building:** The cohort-based model created a strong peer-learning experience and sense of community, both within and across cohorts. Over time, alumni developed trusting, transparent, and supportive relationships, noting appreciation for a shared language and experience. Some expressed that “relationships with the other cohort members have strengthened [our] organization.” They appreciated opportunities to stay connected and one noted, “We would jump at any opportunity to collaborate. We’re like the [Harvard Business School] graduates that stay in touch for 50 years.” Alumni have served as an invaluable resource to the current California cohort, a group that has raved about the presentations and insights shared by alumni at their...
learning sessions. Half of the California grantees have proactively connected with alumni outside of learning sessions to seek their advice. The extent to which this peer network will help to sustain performance-management practices over time is still not clear, but preliminary findings suggest the cohort-based peer-learning model may help to accelerate and sustain change beyond the PropelNext program.

Considerations and Opportunities

- **Consider additional content and supports to help leaders navigate change, growth, and transitions in leadership:** Alumni valued support with talent management, business planning, and other organizational issues. However, alumni felt they could have been addressed more comprehensively. One leader described how their coach brought up talent management in one-on-one sessions, but it was not discussed as a cohort. Another commented, "One of the really underdeveloped pieces of PropelNext . . . is this thread from program design, [to] program implementation, to your theory of talent." For the organizations that experienced growth, most have struggled to keep pace with the infrastructure needed to support it. Leaders identified these as critical areas for which they felt unprepared.

- **Engage alumni in advocacy efforts to shift funder mindsets and support costs of learning and evaluation:** Many alumni brought up the issue of "full cost" and persistent underfunding of general operating and infrastructure to the delivering of high-quality services. One leader said that while she values the investment in data and evaluation, "Convincing the board and others of those decisions can be challenging." Another noted, people “talk all day long about impact and evaluation but nobody wants to pay for it.” Although low overhead rates are ubiquitous in the nonprofit sector, alumni organizations are committed to prioritizing learning and continuous improvement. Alumni leaders recognize that this is a persistent challenge in the sector and system-level change is needed to shift the culture. One leader said, "While there has been a lot of talk about trying to change that mindset with funders and corporations" funders should partner with nonprofits to "advocate for more funding as a percentage of infrastructure to the organization."

- **Explore ways to incorporate an equity lens into PropelNext content:** A number of organizations referenced the implications of culture and racial equity to their programming, and at least one highlighted the challenge of employing culturally appropriate curriculum and assessment tools with their target population. Another mentioned their efforts to incorporate a racial equity lens into their programs and as a value across their organization. Given the demographics and striking disparities among youth served by PropelNext grantees, as well as the groundswell of focus on equity and inclusion in the sector, PropelNext could leverage and contribute to this critical dialogue by weaving an equity lens into program content and by bringing more attention to the issues of racial equity, power, and privilege.  

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25 See [https://ssir.org/articles/entry/the_nonprofit_starvation_cycle](https://ssir.org/articles/entry/the_nonprofit_starvation_cycle)
Appendices

Appendix A: PropelNext Theory of Change

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.

1. Strategies
   - Grants
   - Peer Network
   - Customized, expert coaching
   - Youth organizations with promising programs, strong leadership and a drive to excel through learning

2. Outputs For Grantees
   - Program models and theories of change that are grounded in evidence
   - Performance management systems to track demographics, program usage, indicators and outcomes

3. Interim Results For Grantees
   - Program models are followed more rigorously
   - Organizations are stronger, capable of delivering better results and more prepared for evaluation: this increases potential for funding and expansion

4. Long-Term Outcomes
   - More youth organizations use data to generate insights that inform their work
   - Staff and leadership across the organization use data to drive strategy and performance
   - New knowledge informs other programs

   There is greater understanding of the most effective and efficient ways to build nonprofits’ capacity to use data for learning and ongoing improvement

   Many more disadvantaged youth are able to transform their futures thanks to even smarter, stronger organizations with the reactivity to collect, use and apply data for ongoing cycles of improvement, learning and evaluation
Appendix B: The PropelNext Model

In 2012, the Edna McConnell Clark Foundation (EMCF) launched PropelNext, an integrated three-year program that provides unrestricted funding, technical assistance, and individualized coaching to help a cohort of promising nonprofit organizations adopt a data-driven approach to their work with at-risk youth. PropelNext 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 and a third cohort is planned to convene in late 2018.

While many funders offer capacity-building grants, PropelNext 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 did EMCF make a considerable investment in supporting the Alumni grantees, but participating in the program necessitated a notable time commitment from grantee staff as well. Throughout the three year program, several key leaders and staff across grantees organizations participated in PropelNext related work and activities, including learning and coaching sessions. In fact, it has been estimated that participation in PropelNext is equated to more than one full-time staff equivalent. The program’s intensive combination of supports (e.g., unrestricted grants, individualized coaching, group learning opportunities, and data system work) is part of what makes PropelNext a powerful program. Detailed below are the comprehensive supports that alumni received as part of the first cohort of PropelNext from 2012-2015 (please note changes have been made to the program since 2015):

**Unrestricted Grants:** Alumni received unrestricted grants over three years, totaling $450,000. 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 PropelNext.

**Individualized Coaching:** PropelNext 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:** Alumni participated in a total of 12 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.

**Online Learning Community:** An online community was developed to better support PropelNext leaders and organizations. 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.

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26 Building on lessons learned from the first national cohort, a number of important refinements were made to program structure, content, and delivery for the second cohort in 2015, PropelNext California.
Appendix C: Methodological Framework

Evaluation Framework and Areas of Inquiry

Harder+Company Community Research and Engage R+D conducted a two-year evaluation of the effectiveness of the PropelNext initiative on organizational capacity of the first cohort to use data for learning, self-evaluation, and ongoing organizational improvement. The primary goals of the Alumni Study were (1) to assess how PropelNext has contributed to building and sustaining the performance-management capacity of grantee organizations one-to-two years after participating in the program, and (2) to identify the most effective elements of the PropelNext capacity-building model. Three overarching research questions informed the evaluation:

1. **Sustaining and deepening capacities**: To what extent have alumni organizations sustained the capacities they developed during PropelNext (i.e., internal performance management, including collecting and using data for learning and improvement, organizational change/strengthening, and increasingly robust programs)? How did they sustain them and what conditions facilitated or hindered their efforts?

2. **PropelNext model**: What was the role of PropelNext in helping organizations build and sustain those capacities developed during PropelNext? What elements of the program were most influential in supporting gains and/or additional progress post-PropelNext?

3. **Outcomes and results**: What have organizations achieved at the organizational and program level that can be attributed, in whole or in part, to the capacities they built through PropelNext? What are reasonable indicators of progress at two years post-program? What are unexpected achievements or challenges?

The evaluation team actively engaged EMCF, the PropelNext consulting team, and key advisors in designing and implementing a study to meet the goals and address the questions outlined above. The design and planning for the study benefitted from an iterative process that incorporated the perspectives and expertise of multiple stakeholders.

Based on findings from the first round of data collection, the evaluation team identified six key areas of inquiry for deeper exploration in year two. The core areas of inquiry that were explored in year two are shown in the table below.
### Exhibit 23. Areas of Inquiry for 2nd Round of Data Collection

<table>
<thead>
<tr>
<th>Link to overarching evaluation questions</th>
<th>Areas for deeper inquiry in 2nd round</th>
<th>High-level questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Q1: Sustaining and deepening capacities</strong></td>
<td><strong>Program model, quality, and implementation</strong> (well-designed and well-implemented programs and strategies that are informed by evidence)</td>
<td>• How are organizations using the theory of change and program model framework developed during Propel/Next? Has this practice of program design been extended to other programs? • Are there clear guidelines, training, and supervision to help staff consistently implement with high quality and fidelity?</td>
</tr>
<tr>
<td><strong>Q2: PropelNext model</strong></td>
<td><strong>Demonstrated commitment and evidence of institutionalized learning and continuous improvement practices</strong> (culture that values and embeds learning)</td>
<td>• In what ways are organizations cultivating a commitment to learning? • To what extent is data systematically collected and used to inform reflection, learning, and continuous improvement?</td>
</tr>
<tr>
<td><strong>Q3: Outcomes and results</strong></td>
<td><strong>Organizational decision-making</strong> (courageous and adaptive executive and board leadership)</td>
<td>• In what ways are leaders communicating a clear vision, urgency, and opportunity for becoming a learning organization, and inspiring people to work to achieve this type of change? • In what ways are leaders using data to drive continuous improvement, quality, and performance management and accountability?</td>
</tr>
<tr>
<td><strong>Q1: Sustaining and deepening capacities</strong></td>
<td><strong>Organizational alignment and integration</strong> (focus on monitoring for continuous improvement and mission effectiveness)</td>
<td>• What strategies have organizations used to align, integrate, and institutionalize Propel/Next learnings and frameworks across programs and organizational functions? • What have been the challenges, facilitators, and results of these efforts?</td>
</tr>
<tr>
<td><strong>Q3: Outcomes and Results</strong></td>
<td><strong>Talent management</strong> (discipline, people focused management)</td>
<td>• In what ways have organizations shifted their talent management assumptions, practices, and procedures (e.g., recruitment, hiring, job categories, professional development, training, supervision, performance appraisals) to align with their newly designed or re-designed programs and new ways of working? What have been the key challenges and facilitators? • What is staff’s view of the quality of supervision, feedback, training, and opportunities for professional development? • How are organizations using data to manage growth and/or make critical decisions about financial resources and investments in infrastructure, programming, and talent development? • What have been the biggest challenges to managing and sustaining growth and how are organizations addressing them?</td>
</tr>
<tr>
<td><strong>Q1: Sustaining and deepening capacities</strong></td>
<td><strong>Financial sustainability</strong> (financial health and sustainability)</td>
<td></td>
</tr>
<tr>
<td><strong>Q3: Outcomes and results</strong></td>
<td>**</td>
<td></td>
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Methods

To answer the research questions during both the first and second years of the evaluation, a multimodal methods framework informed both the data collection and the analytic approach. This first round took place in fall 2016 (approximately one year post-PropelNext) and included focus groups and interviews with all grantees from the national cohort. A second, more in-depth round of data collection took place in the fall of 2017 (approximately two years post-PropelNext) and entailed site visits. Each round is further described below.

First Round of Data Collection (October–November 2016)

- **Focus groups with organizational executive leaders (CEO/ED):** The purpose of the focus groups was to understand the extent to which performance measurement and organizational-change efforts had been sustained or enhanced one-year post-PropelNext. We also explored contextual factors, conditions, facilitators, and challenges for sustaining organizational change, as well as other unexpected effects (both positive and/or negative), such as increased funding or expanded programming. A series of three focus groups were organized in the Bay Area, Denver, and New York. CEOs/EDs from the national cohort participated in the one-to-two hour focus group to discuss and shared their post-PropelNext experience with peers and evaluators using a semi-structured protocol.

- **Phone interviews with program directors and key staff:** To better understand how performance management and organizational change efforts are operationalized and sustained, we conducted phone interviews with one-to-three staff from each alumni organization. This entailed a structured interview protocol with program directors and key staff who actively participated in the national cohort. As with the executive-level focus groups, the interviews sought to elicit information about contextual factors, conditions, challenges, and achievements from the perspective of program directors and other key staff with direct experience implementing and operationalizing performance-management and organizational-learning efforts. We recognized that staff turnover may pose challenges and we worked closely with grantee leadership to identify who could best speak to their experience with PropelNext, as well as how performance-management and data-driven learning gets operationalized within the organization.

- **Electronic survey:** We administered an online survey with CEOs/EDs from the 12 alumni organizations in March 2016. This survey aimed to gather further data on key themes that arose from focus groups and interviews conducted with alumni in late 2016.

2nd Round Data Collection for National Cohort (Summer/Fall 2017):

- **Retrospective assessment:** The evaluation team conducted 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) relevant “proof points” from the newly released PIOSA tool, focusing on items that strongly aligned with DBLO and PropelNext 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.

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27 See the Performance Imperative Organizational Self-Assessment
http://leapambassadors.org/products/piosa/
Survey data was 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 survey was administered 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-person site visits:** The evaluation team conducted site visits with 12 national grantees that took place approximately two years post-completion of the PropelNext program. The more in-depth site visit was designed to gather additional data regarding the extent to which grantees were able to sustain and/or extend their capacities, as well as setbacks or challenges that may have impeded their efforts. Site visits provided the evaluation team the opportunity to conduct interviews, focus groups, and surveys with key staff. Additionally, 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. Two members of the evaluation team participated in each site visit. A comprehensive summary of the evaluation activities that occurred during each site visit is displayed in exhibit 24.

- **Interviews with external stakeholders:** Following the site visits, the evaluation team conducted phone interviews with 23 external stakeholders, who the alumni organizations connected to the team via e-mail. The purpose of these phone interviews was to learn more about the changes in capacity observed following the grantee’s participation in PropelNext. To do this, the evaluation team spoke to long-term funders, board members, and partner organizations across 11 alumni organizations. One alumni organization was unable to connect the evaluation team to external stakeholders within the window required by the evaluation timeline.

**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 both the leadership and staff retrospective surveys in year-two. Several staff \((n = 32)\) and some leadership \((n = 9)\) could not provide responses to questions assessing organizational capacity prior to involvement with PropelNext.

- **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 both year-one and year-two. Thematic summaries were developed to capture impressions from both meeting observations and impressions from the site visits conducted in year-two.

- **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, as there was no comparative cohort, findings have
been based on comparisons made only among those that participated in the first
cohort of PropelNext. Second, that some of the staff members who participated in
the first cohort no longer remain at their respective alumni organizations will have
affected the depth and breadth of the information collected at some sites. Last, the
PropelNext model is still evolving and adaptations have been made both during and
after the inaugural cohort. Changes have been made to the sequencing, to
individual components, and to the overall composition of the program with
subsequent cohorts (i.e., incorporating constituent feedback into program design
and delivery).

There are also limitations to be considered with respect to the different forms of
data collection used in the evaluation. Some 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 PropelNext 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 more costly 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
divergence in how pieces of information may be interpreted, coded, and
summarized unless specific training and protocols are followed.
Exhibit 24.  
PropelNext alumni study data sources and methods

<table>
<thead>
<tr>
<th>Data Sources and Methods</th>
<th>Mode</th>
<th>Participants</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Phase 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall/Winter 2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semi-structured focus group (10-items)</td>
<td>CEOs/EDs (n = 12)</td>
<td>To better understand “life one year after PropelNext,” such as the organizational challenges and achievements of grantees, as well as their reflections on the program and how it can be structured or enhanced to help grantees sustain their work over time</td>
<td></td>
</tr>
<tr>
<td>Telephone interview (12-items)</td>
<td>Program leadership (n = 23)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spring 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic survey (14-items)</td>
<td>CEOs/EDs (n = 12)</td>
<td>To dig deeper into several key themes that emerged during the focus groups and interviews</td>
<td></td>
</tr>
<tr>
<td>August-November 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retrospective electronic survey (33-items)</td>
<td>CEOs/EDs, program leadership, data/evaluation staff (n = 36)</td>
<td>To gather retrospective pre-assessment and post-assessment of organizational progress and to provide clarity on which areas to gather more information on during site visits</td>
<td></td>
</tr>
<tr>
<td>Document review</td>
<td>CEO/ED, program leadership, data/evaluation staff, operations staff, etc.</td>
<td>To see concrete examples of how learnings from PropelNext are presented in practice</td>
<td></td>
</tr>
<tr>
<td>Fall/Winter 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semi-structured in-person interview (23-items)</td>
<td>CEOs/EDs, program leadership, data/evaluation staff (n = 33)</td>
<td>To follow up with deeper questioning on relevant areas identified through pre-assessment and to gather more concrete examples of organizational progress. Any documents that have incorporated learnings from PropelNext, including data reports, updated program models or theories of change, strategic and business plans, job descriptions, staff evaluation protocols, etc.</td>
<td></td>
</tr>
<tr>
<td>Semi-structured focus group (13-items)</td>
<td>Frontline staff (n = 65)</td>
<td>To qualitatively explore contextual factors (facilitators and barriers) to sustaining and extending performance management and organizational change efforts</td>
<td></td>
</tr>
<tr>
<td>Retrospective paper-and-pencil survey (24-items)</td>
<td>Frontline staff (n = 65)</td>
<td>To quantitatively explore how staff at various levels experience performance management and organizational change efforts post-program</td>
<td></td>
</tr>
<tr>
<td>Meeting observation (passive)</td>
<td>Leadership, frontline staff, data/evaluation staff, etc.</td>
<td>To observe how staff present, discuss, and use data in real time</td>
<td></td>
</tr>
<tr>
<td>External-stakeholder telephone interview (16-items)</td>
<td>Long-term funders, board members, or partner organizations (two per organization) (n = 23)</td>
<td>To learn more about the changes in capacity observed following the grantee’s participation in PropelNext</td>
<td></td>
</tr>
</tbody>
</table>
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