

PropelNext California: Cultivating a Learning Culture

Year Two
Learning Report

February 2018





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Introduction

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

The integrated three-year program provides unrestricted grants and comprehensive capacity-building supports to 15 youth-serving nonprofits clustered in Southern California and the San Francisco Bay Area. Grantees receive up to \$400,000 to support organizational growth and learning, as well as the enhancement of performance measurement systems. Program elements include customized coaching, group learning sessions, small group coaching workshops, and an online learning community (OLC).

EMCF works with LeadWell Partners and Learning for Action to design and deliver tailored coaching, peer learning sessions, and small group coaching workshops to PropelNext grantees.¹ Through the initiative, grantees sharpen their program models, develop theories of change (TOCs), implement performance management systems, and cultivate cultures of learning and continuous improvement. Ultimately PropelNext seeks to ensure:

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

About the Evaluation and This Report

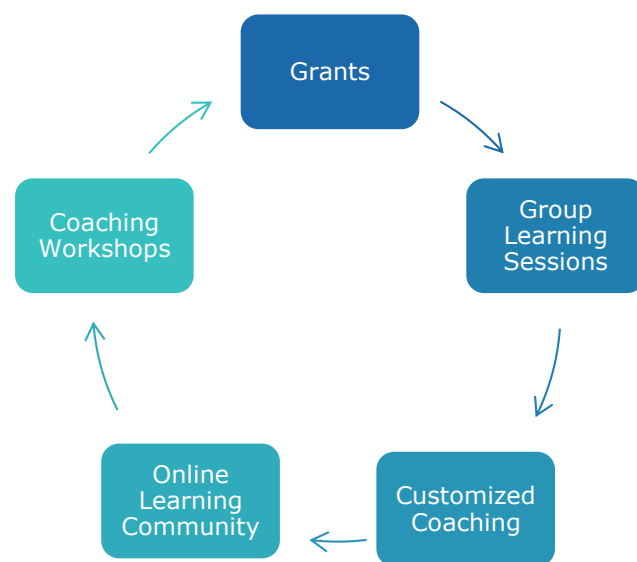
Reflecting a commitment to learning and continuous improvement, EMCF contracted Harder+Company Community Research and Engage R+D to conduct a developmental evaluation of PropelNext California. The purpose of the evaluation is to assess the context, development, and implementation of PropelNext, and to gather baseline information that can be

Northern California Grantees:

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

Southern California Grantees:

Asian Youth Center (AYC)
Bresee Foundation (BF)
Coalition for Responsible Community Development (CRCD)
Los Angeles Brotherhood Crusade (LABC)
My Friend's Place (MYP)
Reach Out West End (RO)



¹ For more information about the consulting team, see the PropelNext website at <http://www.propelnext.org/our-program/consulting-partners/>.

used to evaluate the impact of this work over time. An additional goal is to generate timely insights that support learning, adaptation, and the eventual scaling of the PropelNext model. The overarching areas of inquiry for this evaluation are:

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

Given the evolving and iterative nature of this work, the evaluation seeks to promote ongoing learning by surfacing insights at various points in time. In addition to the annual summary reports, rapid feedback memos and learning briefs are produced throughout the year. Through these various learning products, the evaluation team strives to document the journey of California grantees while elevating key findings about what works and what can be refined to improve results.

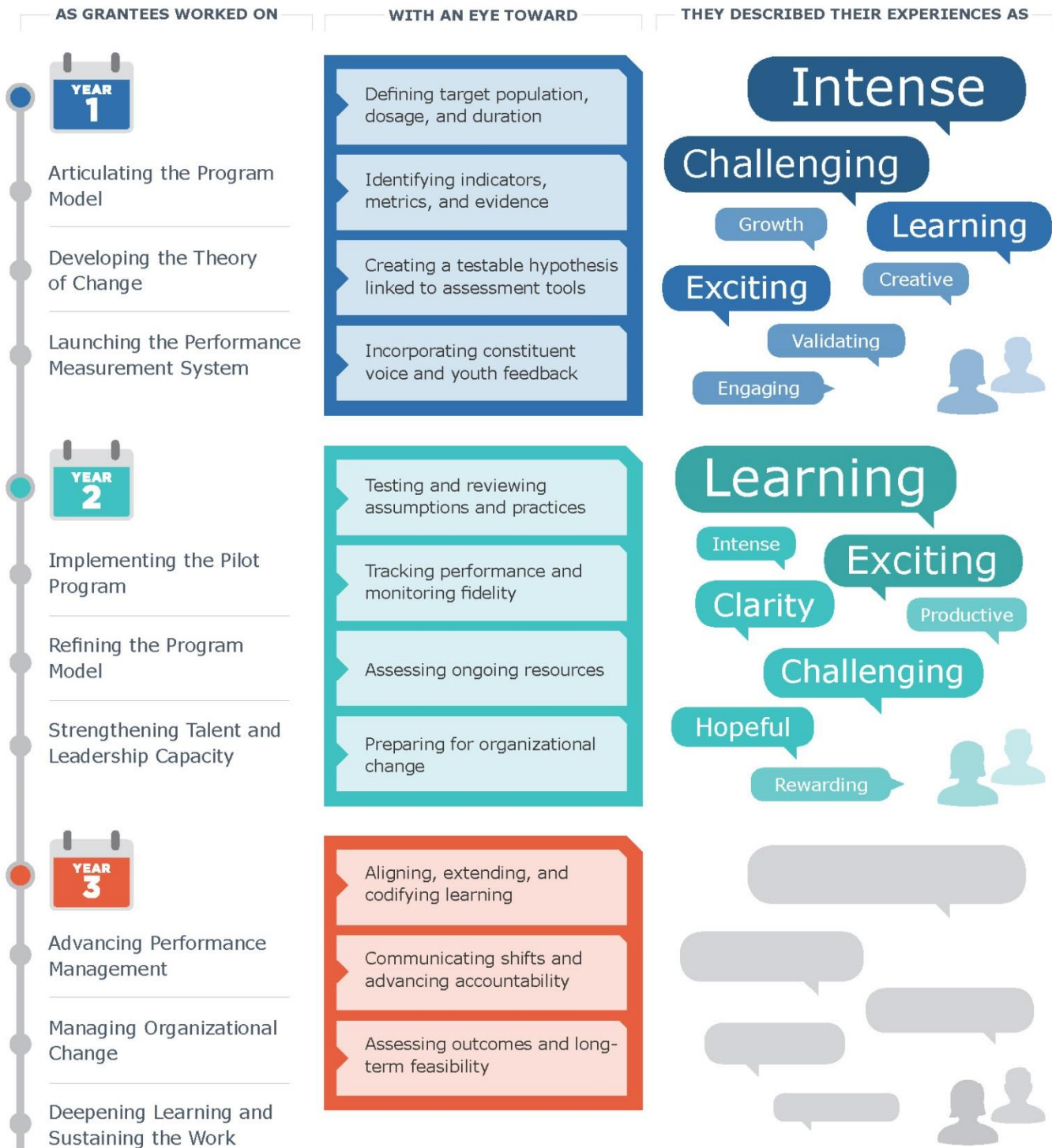


As outlined in the Data Sources and Methods table below, the evaluation gathered information from diverse stakeholders via structured interviews, focus groups, surveys, observations, and document reviews. This report focuses on grantee progress during the second year of the program as well as key levers for building a learning organization. The report then provides reflections and feedback on the PropelNext model and supports, followed by a summary and considerations for future. The journey map on the next page provides a graphic illustration of the California Cohort's journey through PropelNext. 🇺🇸

Data Sources and Methods in Year 2	
Grantees	<ul style="list-style-type: none"> • Interviews and focus groups with 44 leaders and 40 staff from 15 grantee organizations • Surveys with 35 staff from 14 grantee organizations
Coaches & Consultants	<ul style="list-style-type: none"> • Interviews with eight coaches and consultants
Co-Investors	<ul style="list-style-type: none"> • Interviews with five staff from four foundations
Group Learning Sessions	<ul style="list-style-type: none"> • Observations from three large group learning sessions
Small Group Coaching Workshops	<ul style="list-style-type: none"> • Observations from four small group coaching workshops
Existing Documents	<ul style="list-style-type: none"> • Review of select documents and progress reports



The PropelNext California Journey



Building a Learning Organization

PropelNext is guided by the Dimensions for Building a Learning Organization (DBLO), a framework developed by LeadWell and EMCF to assess grantee progress and key milestones as they journey through the three year program. In the first year, PropelNext focused on developing a rigorous and research-informed program model and TOC. In year two, grantees put theory into practice as they implemented pilot programs and gathered data to inform program improvement. By the end of year two, grantees were expected to make progress in five areas outlined below.

Key PropelNext Milestones

- 1. Program Model and Theory of Change.** Grantees have developed, implemented, and refined the program model and TOC, and they have clarified the target population, program components, hypothesis, progress indicators, and outcomes based on the implementation experience and data collected during the pilot test.
- 2. Program Implementation.** Grantees have defined fidelity measures and processes to ensure implementation is consistent with the program model around the target population served and the core program components used.
- 3. Data Collection, Reporting, and Use.** Grantees have demonstrated that there are emerging and systematic processes in place to regularly and consistently track and report data to inform and refine program components, progress indicators, and outcome measures. This use of data drives inquiry, learning, and continuous improvement, particularly among program staff.
- 4. Technology and Infrastructure.** Grantees have fully implemented a performance measurement tool and have provided training and resources to support staff to use the system regularly to improve practice and implementation.
- 5. Organizational Capacity for Learning and Performance Management.** Talent, training, and performance expectations for staff are in place to regularly use data to drive learning and improved outcomes for youth, including for the hire or internal transition of specific staff.

Overall, year-end progress reports completed by grantees and coaches indicate organizations are continuing to make progress in their second year. As grantees put theory into practice, a higher percentage received ratings of “partially achieved” rather than “fully achieved” compared to the previous year. For nearly half the cohort, program implementation posed unanticipated challenges. Most grantees are also still working to fully embed learning into their organizational DNA.

It is important to note that each grantee enters PropelNext with a different combination of assets and challenges. Furthermore, a wide range of internal and

#1 Program Model and Theory of Change:

87% of grantees “fully achieved”

13% “partially achieved”



#2 Program Implementation:

53% of grantees “fully achieved”

47% “partially achieved”



#3 Data Collection, Reporting and Use:

60% of grantees “fully achieved”

34% “partially achieved”

6% “did not achieve”



#4 Technology and Infrastructure:

73% of grantees “fully achieved”

27% “partially achieved”



#5 Organizational Capacity for Learning and Performance Management:

47% of grantees “fully achieved”

47% “partially achieved”

6% “did not achieve”



external factors can influence grantee progress. During the second year, grantees have grappled with staff turnover, a shifting political and funding environment, organizational mergers, and even destructive wildfires—all of which have diverted time and attention from their capacity-building work.

In this section, we highlight how grantees are progressing as well as facilitators and barriers to progress. We also explore the nuances of building a learning organization and how grantees are embedding new knowledge, skills, and capacities into their organizational practices and culture. We have organized the evaluation insights around five key levers that align with the DBLO framework:

- Program Models and Implementation
- Technical Infrastructure
- Organizational Alignment and Integration
- Adaptive Leadership
- Talent Management

Program Models and Implementation

A central thrust of the PropelNext program is to support 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. In year two, grantees began piloting their program models—a process that provided hands-on opportunities to test, learn, and use data for program improvement. Grantees have also been working to improve fidelity of implementation by creating implementation guidelines, clear program outcomes, and progress indicators.

Overall, the pilot implementation both energized and challenged grantees, and many viewed the process as their biggest accomplishment of year two. Several are already tweaking their programs as they learn what works well and what needs to be improved. For some, it is these real-time adjustments and the agility to adapt that they are most proud of. One grantee described, “Our program is super short. We made iterations between round one and round two. I think that we’re already seeing that those were good iterations so far.” Several coaches echoed that pilot implementation was one of the greatest accomplishments to date and that grantees embraced the “mess” of implementation.

Increasing Confidence and Clarity about the Importance of Well-Designed and Well-Implemented Programs

Grantees repeatedly described a new level of rigor, clarity, and transparency as they design and implement programs. One grantee reflected that previous programming was developed organically and that PropelNext has brought an increased focus on outcomes and accountability. At both the leadership and program levels, grantees described the pilot phase as a period of intense learning. As one grantee noted, despite having “a rocky pilot implementation, I’m feeling a lot more confident about doing an implementation with better fidelity to our model this year based on what we’ve learned through the process.” Another grantee described a shift in the mindset of the program management team, stating, “I feel a lot more confident going into this school year than I did last school year [knowing] that my team actually gets it at some level, both in terms of the purpose and what we’re trying to do with data.”

“It’s an iterative process that never ends. 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.”

– PropelNext Alumni

“We’re naming stuff now that we didn’t explicitly name before. [...] We’re starting to voice expectations . . . what we’re wanting to see and trying to put those expectations in our descriptions, policies, and procedures.”

– PropelNext Grantee

Increasing Confidence and Clarity about Data

While frontline and program staff are still building their capacity to gather, use, and interpret data, most expressed a deeper understanding about program purpose, model components, intended outcomes, and how data can support their work.

Exhibit 1 shows frontline and program staff’s level of confidence participating in data activities that were rolled out in year two. Many staff still need support and training to use data to its full potential, but several expressed excitement about using data to support their work moving forward. One staff member stated, “We’re excited because we’re anticipating that we’re going to get a plethora of data that we can comb through and figure out what we can learn from it.”

Exhibit 1. Percentage of frontline and program staff who are “very” or “completely” confident doing the following data activities:



While there is an appetite and appreciation for data, most grantees are still in the “test and learn” phase and in some cases are grappling with issues and gaps in their data sets. For example, some grantees experienced delays in launching their pilots or had participant recruitment issues that impacted their ability to collect and fully use data by the end of year two. Still, most grantees described using data to inform their thinking about target populations and recruitment strategies.

Grappling with Implementation Challenges

Grantees experienced various implementation challenges during year two. For example, organizations implementing programs with high-risk youth often face inherent challenges and grantees could use more guidance rolling out new programming in environments that are frequently crisis-driven. Furthermore, several grantees wish they had built upon an existing program rather than launching something entirely new. One grantee acknowledged significant learning, but said that launching a new program put inordinate strain on the organization and staff.

Organizations that built upon existing programs had more positive feedback. One said, “... working within the existing program involved more staff in the work. I think that’s important. I don’t think we would be as far along in terms of culture change if we tried to do something completely different.” Another explained, “We took 80 percent of what we do, and we adjusted 20 percent of it to make it this much more robust, measurable, with more specific targets, which just ups our game as an agency all the way around.” As a funder, EMCF has also grappled with whether to discourage the development of new programs. The feedback from the California cohort strongly suggests that grantees are better served building on existing programs rather than launching something new.

In addition, some grantees wished they could have slowed the program launch timeline, specifically noting challenges with recruitment and retention. One said they regretted not pacing themselves: “I just don’t think that we had a good

“The two highlights that grew out of year one, and were really solidified in year two, is the fact that we launched this new program, in which the content got deeper. . . [and that] we really, as an organization, committed to it and tried a lot of new things.”

– PropelNext Grantee

enough implementation plan.” The phrase “go slow to go fast” was frequently used throughout PropelNext; however, grantees generally needed to grapple with the experience of launching their pilot themselves to fully embrace this concept and engage in deep learning. Moving forward, more opportunities to discuss common challenges and strategies before implementation may be helpful.

Technical Infrastructure

PropelNext provides funding and support to help grantees upgrade or implement data systems. The first year of the initiative focused on planning and designing the systems, and in year two, grantees had the opportunity to take them for a test drive. For grantees with no pre-existing data system, this was a major leap forward. And, for all grantees, infrastructure development has been an iterative process with some bumps along the way.

Enhanced Capacity and Infrastructure to Gather and Use Data

In the first year of PropelNext, many grantees struggled with data system development and experienced challenges developing a system without a fully fleshed out program model. However, in year two, grantees began to use their data systems and integrate data practices into their daily work. One grantee explained that they “transitioned from a legacy database that was homegrown, into a new system” and that “while the new system is still wonky, that’s a huge accomplishment to have moved from one to the next.” In year two, grantees generated basic data reports and integrated data into staff meetings, and some developed data inquiry teams to champion data efforts across departments and programs. Grantees talked about the benefits of a centralized data system and the process for gathering data and facilitating its use. One grantee noted, “There’s one point of contact now for data requests. Previously, a lot of data and numbers went through different people in the organization, but now we have centralized ourselves into one database. [...] It’s still a work in progress, but I think we’re definitely making great strides in that direction.”

Building a Data and Evaluation Team

PropelNext also focuses on developing the human capacity to champion and sustain data-driven learning practices. For many grantees, hiring and/or expanding an internal data and evaluation team has been an important and tangible milestone. Nonetheless, finding the right talent to fill these new positions has not always been easy. In some cases, the issue is finding individuals with the right combination of technical skills, learning orientation, and cultural fit. Several grantees reported poor responses to job postings or not having a strong pool of candidates to choose from. As several coaches observed, without dedicated learning and evaluation staff to facilitate learning conversations, grantees struggle to make meaning of their data.

Organizational Alignment and Integration

Transferring knowledge, practices, and skills across an organization is another important lever for cultivating a learning and data-driven culture. While the pilot programs offer grantees opportunities for “learning by doing,” this learning will have limited impact on the organization as a whole without explicit strategies for transferring knowledge and embedding practices.² The evaluation team looked for

“I think with our launch date we were feeling some pressure . . . I think we could’ve used a little more time to test some things first before launching with that first cohort.”

– PropelNext Grantee



² Garvin, David A. “Building a Learning Organization.” *Harvard Business Review* (July-Aug 1993).

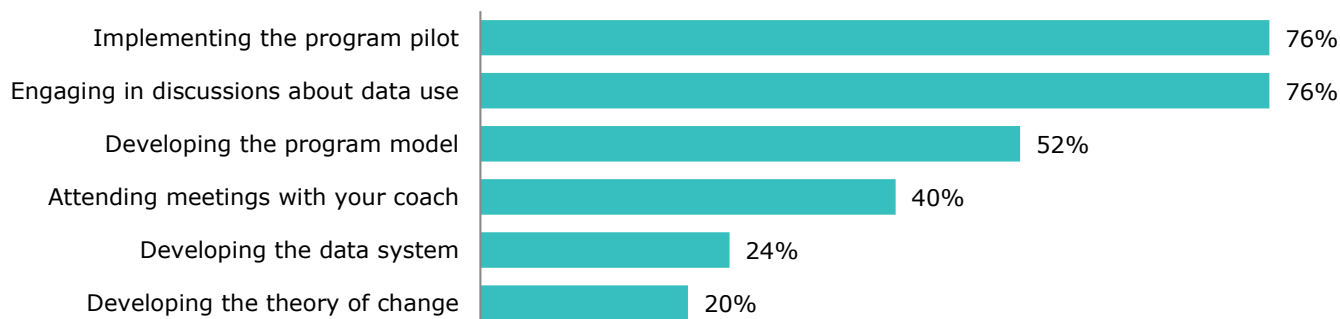
evidence of strategies for transferring knowledge across the organization and noted a variety of mechanisms and efforts for sharing knowledge and engaging staff in learning. Staff meetings were the most commonly mentioned vehicle for transferring PropelNext knowledge and resources to program and organizational staff. Through small group coaching workshops, direct contact with coaches, and access to the online learning community (OLC), organizational staff were also able to tap into the PropelNext experience more directly.

One grantee reported, “PropelNext topics have definitely swept across our entire organization.” Others described efforts to extend practices, tools, and frameworks to other programs and departments. One coach observed “they’re beginning to standardize every one of their programs, they’re just doing it, it’s totally spreading, [and] it’s wildly effective.” Demonstrating such efforts to enhance programmatic structures, one grantee noted that their organization plans to ask “each program to come up with one or two outcomes that the program will focus on” along with corresponding indicators. As one leader put it, “Basically, we are taking a program model from PropelNext—the template—and asking the other program to try to fill it out.”

Engaging Program Staff and Creating a Sense of Ownership

Grantees appreciated opportunities to expose more staff to the PropelNext experience through the group learning sessions and small group coaching workshops. One executive director shared, “we [were able] to take our data person to the small coaching sessions and it just did wonders. And even getting buy-in from them . . . that was a really big deal.” Engaging program staff in coaching sessions has also helped spread knowledge and create more buy-in. As shown in Exhibit 2, two out of five program staff surveyed said they attended meetings with their organization’s coach in year two. Program staff not involved in PropelNext activities said they would have benefitted from more engagement and involvement in the theory of change development and program design.

Exhibit 2: Percentage of program and frontline staff who reported involvement in PropelNext activities since July 2015 (n = 25)



Adaptive Leadership

Research and insights from the field of organizational effectiveness underscore the critical role leaders play as champions of organizational learning by articulating a vision and learning goals that clearly connect to the organization’s mission.³ Equally important is the role leaders play in modeling learning practices and cultivating a culture of reflection and learning.

Cultivating a Learning and Data-Driven Culture

³ https://ssir.org/articles/entry/the_challenge_of_organizational_learning and <http://leapofreason.org/>

“I was able to attend the [small group coaching workshop] . . . they actually took ideas from us, and we were able to be heard as far as what we think needs to change in our program models.”

**– PropelNext Grantee
Program Staff**

In year two, organizational leaders focused on sharing knowledge and engaging more staff in the cultural shift towards learning. A member of the alumni cohort underscored the role of executive leaders as “culture keepers” with a responsibility to articulate a vision, engage staff, and model reflective practices. “At some staff meetings we revisited how we’re progressing on our path as a learning organization, and really framing it and making clear that this pilot is a feat and a much larger shift for us as an organization,” noted one leader, “[We need to be] clear and articulate about that from the beginning. The coaching and the messaging that we’ve received from PropelNext has helped us with that.”

According to one staff member, “Before PropelNext, people would feel stigmatized by looking at data . . . but with the PropelNext work, it’s been very clear that data is about learning.” A staff member from a different organization echoed that PropelNext has “made me think about things that I didn’t think about before, and I’ve been doing this work for a long time . . . I like the whole idea of embracing the beauty and the challenges of constantly having new iterations of something.” One director reflected on the importance of bringing “everybody on board early. We kind of did it on the fly. In some ways that was dictated by the pace of PropelNext, but I think we also didn’t anticipate the amount of time it would take to really help people understand where we were headed and build the culture around the work we were trying to do.”

Aligning Vision with the Reality of Implementation

Leaders are becoming more acutely aware of what it takes to move from the aspirational goal of high-performance to embedding a learning mindset throughout the organization. As one described, “That means everything from administration to programs and outreach—everything has to be at a high-performing level. It’s not just talking about it; it’s about putting systems and policies and resources behind it. Then being patient. Patient enough to understand that these things take time. It just doesn’t happen overnight.” For some leaders, this has also meant having the courage to slow down important policy, program, or staffing decisions and not let “a funder or a deadline rush us into a hiring process that [is] not beneficial to the organization or people we’re serving.”

In year two, leaders have focused more attention on engaging and coalescing people around a shared vision. For some, this has required deep reflection about their leadership style and how to adapt to the evolving needs of a learning organization. In many ways, organizational leaders are modeling a practice of learning and reflection. As one leader noted, “We used to be very siloed and each department leader really communicated the vision for the department. Making that transition to a unified organizational vision and culture, I guess I didn’t anticipate how much time and work that would be for me. And how much individual staff who don’t work with me would still want to talk to me and need to hear from me.”

Expanding and Distributing Leadership

A number of grantees have created new positions (such as deputy directors) or integrated new members into their leadership teams. One executive director shared, “We’re going from essentially an organization where all the strategic conversations are happening between two people to an organization where the strategic conversations are happening amongst eight people who represent a cross-section of the organization. Our fiscal person, data and evaluation person, communications and talent development person, and our program folks—having all of those folks at the table both for their input as well as their learning.” While this

“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.”

– PropelNext alumni

was something they had wanted to do, “PropelNext gave the organization a reason and a purpose” to distribute leadership and expand the table.

Several grantees are building their leadership capacity around talent development. One grantee did an organizational assessment, examining staffing and talent gaps at different levels of the organization, and ultimately decided to create a deputy director position to grow staff capabilities. One leader described this realization: “In our case, we really had to look at the talent on the data team. What kind of skills and competencies do we currently have? Do we need to bring new staff into the organization? And then [we looked at] our current training staff. That led to the creation of the new [deputy director] position to really focus on [internal] coaching and staff development.”

Engaging Boards and Managing Expectations

Most executive leaders are engaging their boards differently around data use and a few are still laying the groundwork for change. Two grantees mentioned using data dashboards and visualizations with their boards for the first time since starting PropelNext. Grantees also noted a shift towards presenting outcome data rather than outputs. One executive director reflected, “They used to be very interested in outputs—how many units are serviced, how many kids, and [if] it’s an audit, are we in compliance or not. And now they’re more interested in outcome, impact, and lessons learned.”

Grantees expressed concerns about overwhelming their boards or introducing them to a results-based framework before they have results to share. “They’ve been asking good questions,” one director shared, “but honestly, we haven’t been giving them an overwhelming amount of information, because as soon as you talk about planting a seed, then people want to know what’s the result. And you just can’t make that go fast.” Another executive director highlighted excitement among the board, as “they were very impressed and very supportive, and they just said give us more. I’ve had at least two of the board members talk to me afterward . . . ‘This is exactly the right way that we should be heading,’ and, ‘yeah, give us more!’”

Talent Management

Investing in people and developing talent is yet another critical lever for building a learning organization and achieving greater results.⁴ Throughout year two, organizational leaders have been increasingly curious about and focused on talent management strategies to get the “right people in the right seats.”

Assessing Issues of Skill, Will, and Talent Gaps

Nearly all grantees have been assessing the ability and desire of current staff to engage in a learning-driven culture. As one PropelNext alumni reflected during a large group learning session, when confronted with resistance from staff, leaders need to ask themselves, “Is this a skill issue or a will issue? When do we draw a line in the sand and bless and release people when it’s time for them to go?” Many of the California grantees are asking themselves these questions and considering talent gaps that may prevent them from taking their organization to the next level. A number of grantees shared surprise at the lack of pushback, noting that staff by and large have been open and enthusiastic about organizational shifts. At this point, the bigger issue appears to be gaps in talent and whether organizations have



“There’s always a friction between perfection or moving quickly and bringing people along. You always need to navigate. When you’re leading, you’re not leading yourself, you’re leading the organization. And you don’t lead in isolation.”

–PropelNext Grantee

⁴ <https://ssir.org/talent-matters/entry/the-uncomfortable-truth-about-talent-development>

the right talent and staff capacity to propel and sustain a higher level of performance.


Reframing Performance and Accountability

Many leaders talked about their efforts to clarify performance expectations and move performance conversations from judgement and compliance to learning and better outcomes for youth. While many leaders understood this shift in theory, some grantees felt that more training and coaching on the topic earlier in the PropelNext program may have been valuable. One executive director described moving from a relational model of supervision to a performance and impact-driven model, noting, “I think we knew theoretically we were going to have to do that, but we didn’t have any idea what that meant. Having some training and coaching around that early on I think would have been very beneficial for us.”

Another grantee reported, “We have used PropelNext as a vehicle to communicate to ourselves and to the team that change is upon us. We’ve not done this consistently, but that we really want everyone to be performing at exemplary levels. That we expect the best of ourselves for the young people.” While many grantees are still in the early phase of clarifying accountability structures and expectations, one-on-one coaching and peer group learning sessions have also provided useful content and guidance.

Shifting Recruitment and Onboarding Practices

Grantees noted a variety of ways their recruitment and onboarding efforts are shifting. Many mentioned job descriptions and announcements that clearly articulate expectations about learning and data use. Others talked about changing what they ask job candidates and who they involve in the hiring process. For one organization, this means “The department heads are working more closely with our human resource manager, which didn’t used to take place as much before. I think that led to identifying and bringing on the talent that would be a good fit for specific programs and specific projects. Because the directors are a lot closer to the programs than the senior human resource manager,” they are in a better position to determine whether “that person may or may not be a good fit. So that internal collaboration has definitely added some value to bringing on talent.”

As part of a peer group learning session, grantees worked on how to reflect their commitment to diversity, equity, and inclusion in hiring and staff development efforts. Grantees recognized this as a challenge for the entire sector but expressed a desire to be more intentional in incorporating diversity, equity, and inclusion in their talent management strategies.⁵ 

⁵ Finding and retaining talent was a key topic of discussion at the May 2017 learning session, featuring guest speaker Vu Le, executive director of Rainier Valley Corps and blogger about the nonprofit sector.

Reflections on the PropelNext Model

PropelNext aspires to help grantees “bring the learning home” and embed a culture of learning into the fabric of daily operations. The additive formula and intensive combination of supports are part of what makes PropelNext a powerful program. At the same time, EMCF and the consulting team continue to seek ways to strengthen and streamline the program with an eye towards scale and sustainability. This section highlights insights about the value and effectiveness of the various program components and how they deepen and accelerate grantee progress.



Coordinated Cohort Model



PropelNext is a highly coordinated and intense model that seeks to create a sense of community and a strong peer-based learning experience. As a cohort model, grantees receive the same content and capacity-building supports from a dedicated team throughout the three year initiative. It entails considerable planning, coordination, and relationship management across a diverse range of stakeholders and partners. In addition to feedback from grantees and coaches, the four foundation co-investors provide a unique birds-eye view on how the initiative compares to other capacity-building programs.

- **Strong relationship management creates a solid foundation for success:** PropelNext was described by co-investors as rich with opportunities for learning and characterized by positive group dynamics, clear communication, and impressive project management. They also cited the cohort model and the supports provided— namely, coaching—as the main strengths of the initiative. As one co-investor noted, “There’s power in the cohort model if it’s managed well, and if there’s sufficient room for the organizations to really learn from each other and if the incentives are set up the right way.”
- **Regional clusters provide opportunities for deeper engagement, collaboration, and local impact:** Co-investors, coaches, and grantees cited the multiple benefits of regional clusters including bringing more resources to the area and strengthening the capacity and network of youth-serving organizations. Despite the potential for competitive funding tensions, grantees have been highly collaborative – partnering on funding opportunities and openly sharing programmatic, operational, and training materials.
- **Cohort model builds capacity for scalable impact on youth outcomes:** There are promising signs the cohort model and regional focus are fomenting collaboration and a desire to contribute to strengthening the sector. One alumni director shared, “I felt like I was part of a movement to elevate the sector. Something bigger than me and my organization. Our kids deserve a sector that elevates the work [and is] really centered around better outcomes for kids.” California grantees echoed this shared sense of commitment and responsibility for building a

sector that delivers better outcomes for youth. “We’re hoping that the things that we are learning will help us become leaders in the field among our peers,” one director shared.

Program Content



Grantees had positive things to say about the quality, timeliness, and relevance of content that aligned with the implementation of their pilot projects and issues related to organizational change. We highlight the most notable feedback and insights below.

- Grantees are hungry for “relevant and relatable” content on managing organizational change:** Grantees valued the content shared in group learning sessions and are eager for more relevant content on managing organizational change. One grantee reported the content was well-aligned with the growth (and the growing pains) of their organization, saying it “fit well with the things that we were actually experiencing, and a lot of the sessions helped in dealing with some of the situations in the organization and helping us to keep afloat.” One commonly mentioned area for improvement was the need to frame and tailor change management content to reflect the nonprofit context better. Several grantees commented that some of the change management content felt too corporate and unrelatable.
- Exploring ways to incorporate constituent voice:** The introduction of content about constituent voice was appropriate for some grantees, but others felt they were not far enough along in their pilot to fully contemplate how to systematically gather and incorporate youth feedback. Nonetheless, as year two progressed, several grantees reached out for more guidance from coaches. While the session may have been premature for some, it does appear to have planted the seed and given grantees a greater appreciation for the value of constituent voice. More grantees noted they are exploring how to incorporate beneficiary feedback loops into their learning and continuous improvement cycle.

Dates	Year 1–2 Learning Topics
Session 1 (Oct 2015)	Articulating program model and introduction of TOC
Session 2 (Jan 2016)	Developing hypothesis and metrics for TOC
Session 3 (May 2016)	Advancing the journey and building a community of practice
Session 4 (Sep 2016)	Strengthening organizational capacity for pilot testing and implementing TOC and building data practices
Session 5 (Jan 2017)	Leading and managing change and strengthening performance management
Session 6 (May 2017)	Building a community of practice, developing leaders, and breaking nonprofit myths

Customized Coaching



The Propel/Next coaching team is made up of skilled consultants with diverse experience in a range of relevant areas. Each coach is assigned to at least one grantee organization and actively participates in group learning and small group coaching workshops. Grantees receive customized one-on-one coaching to help apply the lessons from group sessions and address their unique needs and context. Below we outline key success factors as well as considerations for enhancing the coaching model.

- Coordinated and high-quality coaching model:** Tailored coaching was lauded by grantees as critical to advancing their learning and organizational growth. Grantees noted the quality and caliber of the coaching team and their ability to support their unique needs. “I felt that our individual coaching sessions [were] the most helpful because I found it to be the most tailored to our organization . . . It’s really focused on where we’re at as an organization and what challenges and obstacles

“The individual coaching has probably been the most useful—just getting that individualized attention from someone who’s very familiar with our program, our organization, our needs.”

– Propel/Next Grantee

we're struggling with," commented one grantee. In addition to help with program implementation, grantees value support with organizational issues such as staffing, talent, and managing change. One co-investor observed, "It's not like you're getting a generic consultant . . . Every step of the way they're bringing in the best and the brightest. It's well run and it's really tapping into expertise and bringing that to this group, which makes a huge difference."

- **Effective grantee-coach relationships:** Grantees commented on the importance of developing trust, with one grantee commenting, "We built a level of trust where I think our conversations and the support we received could go a lot deeper. I feel like we could be completely and utterly honest and vulnerable in a way that I didn't feel that I could be in year one." Underscoring the importance of building trust in this relationship, a small number of grantees expressed they weren't always certain how candid they could be with their coach and wondered whether sharing too much about their struggles could be perceived as an inability to meet some of the initiative's expectations and thus impact future funding.
- **Diverse expertise of coaching team:** In year two, grantees interacted more frequently with other members of the coaching team beyond their assigned coach, and appreciated the unique and diverse expertise all the coaches bring to the table. Quite a few mentioned how their coach connected them to other coaches for help on specific issues and others said they appreciated the contributions of coaches at large group sessions. One grantee commented that a "great aspect of the coaching is that the coaches seem to all work together and understand when to pull in other people's help whenever necessary, depending on our needs."

Coaching and peer learning sessions stand out as the most critical components of Propel/Next

When grantees were asked to rank which strategies were most critical for their success, coaching came out slightly ahead of group learning sessions, with over half of the 25 leaders interviewed ranking coaching first.

The Power and Potential of Peer Learning



Overall, grantees found tremendous value in opportunities to connect with their peers and alumni from the previous cohort, ranking the large group learning sessions as one of the most impactful aspects of the program.

They also noted that alumni have presented some of the most germane content at large group sessions. Peer learning appears to be emerging as an accelerator of change providing additional fuel for supporting grantees after the Propel/Next program. Below we highlight ingredients for effective peer learning engagements.

- **Structured sessions strengthen connections and peer networks:** Throughout the second year, relationships among grantees continued to deepen and evolve into a strong regional support system that grantees are lauding as one of the most beneficial components of Propel/Next. According to one grantee, "That's been one of the biggest gifts—the access to peers—so we're really appreciative of that." Many grantees said it was reassuring to talk to other members of the cohort who were facing similar organizational or programmatic challenges and said they often left sessions feeling energized and with a new toolkit of strategies or solutions. Quite a few grantees have proactively reached out to peers between sessions to share information on specific topics. Some are actively partnering or considering ways to partner with peer organizations in the future.
- **Topic-specific sessions support peer-to-peer learning:** In response to grantee feedback, more breakout opportunities during large group learning sessions were available during year two. These sessions allow teams to connect with peers in similar roles (e.g., executive directors,

"Overall what we found to be the most beneficial was the peer learning, both from our current cohort peers as well as the first cohort."

– Propel/Next Grantee

program leaders) as well as with organizations with similar program models. This has led to deeper discussions, group problem solving, and more connections among peers. For example, executive directors discussed strategies for engaging their boards and managing organizational change, while program and operational directors could have deeper discussions about program implementation and data use. One grantee reflected, "I did like breaking out program [staff] and executive directors. I think that there were really good separate conversations that were valuable to us in our different, respective roles that wouldn't have been as useful if we had been in a joint session."

- **Alumni network is a critical resource:** PropelNext alumni have provided inspiration and crucial insights for the California cohort. One grantee commented, "Having access to the old cohort is probably the most valuable thing in this whole relationship . . . because having their insight into the journey calms our fears and our anxiety of trying to take a whole organization through this process." Several grantees said some of the best and most meaningful presentations at the larger group sessions came from the alumni. Half of the grantees have actively connected with alumni outside of learning sessions to share materials and resources, meet in person, or conduct site visits.
- **Small group coaching workshops provide space for group problem solving:** Grantees appreciated the opportunity to include more staff in collective problem-solving in small group workshops. "It's like having this amazing group of folks really delve into each other's work to give really thoughtful feedback," noted a grantee. A few grantees suggested alternative groupings in the future, such as multi-service organizations, similar geographies, or organizations in a similar place in their organizational life cycle. One grantee saw value in organizing groups by geography as a way to avoid duplication and to identify possible opportunities to partner. Some suggested giving organizations the option to join by video conference to eliminate travel time, and others recommended clarifying expectations and learning goals before each session.
- **Online learning community (OLC) creates space for tools and resources:** The OLC provided grantees opportunities to stay in touch outside of meetings. One described the OLC as a platform to stay connected between the group sessions, noting "it's easy to pull up somebody's email and reach out if you have a question or if you want to connect with somebody." Grantees valued the content and most view it as helpful resource, and easy to navigate. One shared that "It's been super useful to be able to know I can log in there to find the reading materials. I've gone back in and referred back to things after the sessions." Nonetheless, some grantees are not avid users and as a result, the OLC has been under-utilized by some members of the cohort.



"If you don't actually carve out time to do learning and to learn in a group setting, it doesn't happen. That's why the learning sessions are, I think, the best part of the deal."

- PropelNext Grantee

Key Takeaways and Future Considerations

PropelNext is designed to help nonprofits accelerate change and make a big leap forward on their journey to high performance. It is not a “one and done” program; instead, the layered supports, tools, and new knowledge gained through PropelNext help prepare organizations for the many changes, challenges, and opportunities that lie ahead. Conversations with grantees about the future revealed a range of reflections—from concerns about funding and bandwidth to maintaining momentum and discipline after PropelNext ends. They are contemplating how this work contributes not only to their own organization but provides opportunities to strengthen the nonprofit sector and improve youth outcomes on a larger scale.

The second year of PropelNext provided grantees with ample space to test, learn, and embed a culture of inquiry into their organizational DNA. High-quality program content, coaching, and peer learning were noted as critical accelerators supporting progress in the areas summarized below.

Key Levers for Building a Learning Organization	
Program Models and Implementation	<ul style="list-style-type: none"> Engaging in systematic problem solving as grantees develop research-informed program models, test their hypotheses, and make data-informed program improvements Gaining confidence and clarity about well-designed and well-implemented programs Developing feedback loops and engaging in a cycle of inquiry
Technical Infrastructure	<ul style="list-style-type: none"> Implementing and refining data systems Building internal expertise and data champions Building human capacity to train staff to collect and interpret data and facilitate data use
Organizational Alignment and Integration	<ul style="list-style-type: none"> Engaging staff and developing mechanisms for sharing knowledge across the organization Transferring program models and TOC frameworks to other programs Developing a shared language and sense of ownership around data
Adaptive Leadership	<ul style="list-style-type: none"> Modeling a learning- and data-driven culture Aligning vision with the reality of implementation Expanding and distributing leadership Engaging and managing board expectations
Talent Management	<ul style="list-style-type: none"> Assessing skill, will, and talent gaps Reframing the conversation about staff performance and accountability Shifting recruitment and onboarding practices

In addition to grantee progress, the evaluation also surfaced useful insights and themes related to the PropelNext model and the core strategies used to help propel organizations to a higher level of performance. In many ways, the California cohort continues to be a “test and learn” opportunity with lessons and insights for both the program and the broader field of nonprofit capacity building. Key takeaways and considerations for the PropelNext model are outlined below.

1. Continue to Explore Variations to the Time, Intensity, and Overall Streamlining of the Cohort Model

The ability of EMCF and the consulting team to rapidly respond to feedback and make programmatic refinements has been impressive and models a true commitment to continuous learning and improvement. However, there are still several programmatic features being tested. Grantees, coaches, and co-investors alike are grappling with how these tweaks might impact results. For example, some question whether the length and intensity of the program could be dialed back. One co-investor expressed that the program might be too demanding for grantees, noting, “The environment is so dynamic, and there’s so much [that requires grantees] to have that level of focus and concentration to ingest this for three years.”

Based on feedback from grantees, another key consideration is whether grantees should test an entirely new program or build upon something that currently exists. EMCF is already exploring other variations to the model through adjustments to time, intensity, sequencing, and core strategies. More testing and learning is needed to understand the trade-offs of these variations to the model. That said, the peer learning approach and the regional clusters are emerging as highly promising strategies for deepening, accelerating, and sustaining this work.



2. Explore Ways to Continue to Leverage and Solidify a Cohesive and Coordinated Coaching Team

As noted earlier, coaching plays a critical role, and a high-performing and well-coordinated team has direct and lasting benefits for the overall program. Grantees overwhelmingly lauded the high quality and customized nature of coaching and valued access to the diverse expertise of the coaching team during year two. Propel/Next should continue to cultivate the team-based coaching approach and should look for ways to leverage the expertise and skills of the coaching team. This might include expanded engagement of coaches in planning, facilitation, and delivery of group content. As Propel/Next expands to include future cohorts, it would be highly beneficial to better articulate the coaching model as well as how to recruit, cultivate, and retain a sustainable pool of coaches for future cohorts.

3. Explore Strategies to Support Knowledge Transfer Within and Across Grantee Organizations

Many grantees expressed both excitement and trepidation about effective ways to engage internal stakeholders (staff and board) in Propel/Next learning opportunities. Given the limited number of staff that have meaningful touchpoints with the Propel/Next program, it may be worth exploring other intentional strategies to help organizational leaders transfer and spread Propel/Next knowledge more effectively. Some grantees noted the benefits of having their coach attend staff retreats or board meetings. Another strategy may be train-the-trainer materials to help leaders more readily share and transfer what they are learning with others in the organization.


4. Explore Ways to Support Sustainability Planning and Concrete Strategies for Managing Change Post-Propel/Next

Financial sustainability—namely, securing funding to cover future programming costs and retain new staff—is the primary concern grantees, coaches, and co-investors anticipate post-Propel/Next. Other concerns that grantees see on the

horizon include losing the support of their coach, staying on track with set deliverables, and the loss of PropelNext funding. As the end of PropelNext nears, many grantees are already putting plans in place to deal with financial concerns and some are planning regular retreats and meetings to sustain momentum after PropelNext. Many grantees anticipate the ability to sustain revenue streams to continue with the PropelNext work as the biggest challenge post-PropelNext. As one grantee noted, “I would have liked to come into [PropelNext] a little bit eyes wide open, and maybe have found another matching grant to pair with it to support the work sooner.”

Sustaining the momentum and rigor of their work without the accountability and support of the initiative also emerged as a key sustainability concern. Co-investors emphasized the importance of helping grantees prepare for life after the program. One expressed concern about the capital infusion to help support new infrastructure and operating costs and whether grantees have given this enough thought. This echoes issues raised by the alumni in the [Sustaining Change: PropelNext Alumni Results One Year Later](#) report. One suggestion is to “coach the organizations on sustainability planning” and to develop a funding plan in the last year of the program.

5. Continue to Strengthen and Leverage the Peer Network

Another trademark feature of the PropelNext model is the emphasis on creating a sense of community and a strong peer-based learning experience. As highlighted in this report, the peer network—both within and across the California and national cohorts—has been powerful and inspiring. Both cohorts have demonstrated a highly collaborative spirit and a desire not only to stay connected, but to contribute to strengthening the sector and improving outcomes for vulnerable youth on a much larger scale. The regional approach also appears to help facilitate deeper connections and in some cases has encouraged funding partnerships and sharing of resources within and across cohorts. Funders, consultants, and coaches should continue to facilitate connections, create space for peer learning, and explore ways to more fully leverage this growing network of PropelNext peers. The evaluation will continue to explore the nature and quality of connections across the cohort to better understand the potential power of the network and strategies to further leverage it as a resource. 



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