PropelNext California
Year One Learning Report

propel*next*

harder+co | community research

Contents

Introduction

In 2015, the Edna McConnell Clark Foundation (EMCF) joined forces with the William and Flora Hewlett Foundation, the David and Lucile Packard Foundation, the Sobrato Family Foundation, and the Weingart Foundation to launch Propel*Next* California. Propel*Next* is an integrated three-year program that provides unrestricted grants and intensive capacity building supports to 15 youth servicing organizations. Grantees receive up to $400,000 to support capacity building and the implementation or upgrade of performance measurement systems. The spectrum of supports includes expert coaching, group learning sessions, small group coaching workshops, and an online learning community (OLC). Through the initiative grantees enhance and sharpen their program models, develop theories of change (TOCs), implement robust performance management systems, and cultivate organizational cultures of ongoing learning and improvement.

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)

EMCF and their funding partners engaged Harder+Company Community Research to conduct a developmental evaluation of Propel*Next* California. The focus of the evaluation is to assess the context, development, and implementation of Propel*Next*, and to gather baseline information that can be used to evaluate the impact of this work over time. A secondary goal is to generate timely insights that can support learning, adaptation, and the eventual scaling of the Propel*Next* model.

The areas of inquiry for this evaluation are:

- How are grantees progressing through Propel*Next*?

- What facilitates or supports grantees' progress in the Propel*Next* program? What hinders grantees' progress?

- How and to what extent are grantees infusing Propel*Next* learnings and practices into their organizations?

Given the evolving nature of the work, this developmental evaluation promotes continuous learning by surfacing key insights at various points in time. Rapid feedback memos are generated on an ongoing basis and are designed to promote continuous learning, reflection, and discussion about program design and adaptations. This report synthesizes information collected in 2016 and documents the journey of California grantees during the first year of the program. Specific data sources and methods are highlighted in the table to the right. The report is organized around the areas of inquiry referenced above and begins with an overview of the goals, purpose, and defining characteristics of the Propel*Next* California cohort. ⊞

Date Sources and Methods	
Grantees	A total of 36 interviews conducted with staff from 15 grantee organizations
Coaches & Consultants	Nine interviews with coaches and consultants
Group Learning Sessions	Observations from two large group learning sessions and survey results from grantees
Small Group Coaching Workshops	Observations from four small group coaching workshops
Existing Documents	Review of select documents and reports
Online Learning Community	Analysis of usage and search terms

Evolution and Progress
How are grantees progressing through Propel*Next?*

Propel*Next* is an innovative capacity building program that propels youth-serving nonprofits to the next level of organizational performance by helping them strengthen program design and use data for learning and improvement.

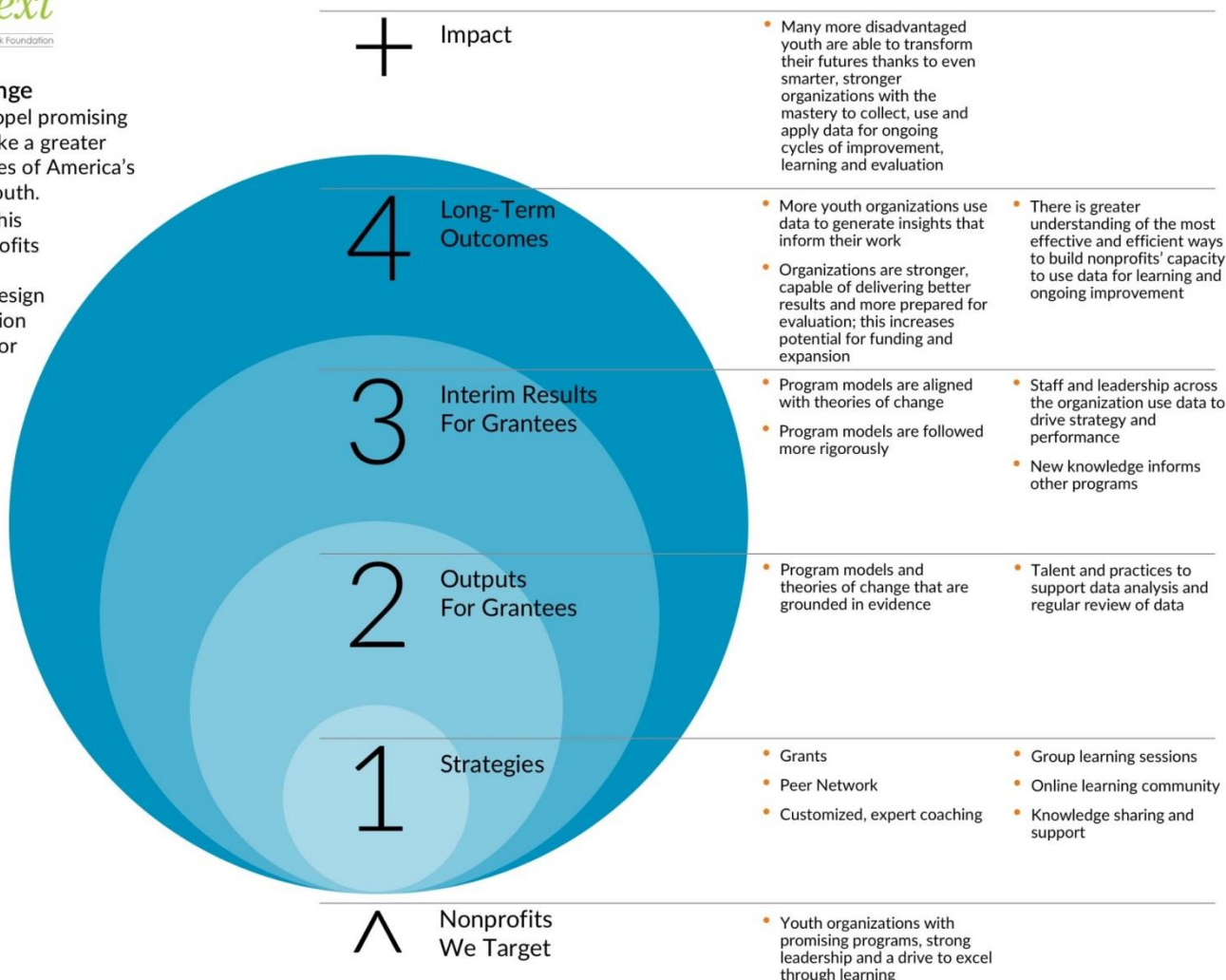The expected long-term outcomes of Propel*Next* are that:

- More youth-serving organizations use data to generate insights that inform their work;

- Organizations are stronger, more capable of delivering better results, and are 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

propel*next*
an initiative of the Edna McConnell Clark Foundation

Theory of Change
Our goal is to propel promising nonprofits to make a greater impact on the lives of America's disadvantaged youth. We accomplish this by helping nonprofits strengthen their youth program design and implementation and use of data for learning and improvement.

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

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

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

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

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

∧ Nonprofits We Target
- Youth organizations with promising programs, strong leadership and a drive to excel through learning

To help design and deliver capacity building strategies, trainings, and tools to Propel*Next* grantees, EMCF works with LeadWell Partners, a national coaching and consulting firm that helps nonprofits and emerging businesses build the capacity to design and execute strategy, navigate change, and use data to improve performance. LeadWell works in partnership with Learning for Action (LFA), a California-based consulting firm specializing in customized research, strategy development, and evaluation services.[1] Together, these organizations develop and deliver content and engage a team of seasoned consultants to provide one-on-one coaching to Propel*Next* grantees.

The initiative was officially launched in 2012 with a national cohort of 15 grantee organizations. In 2015, EMCF formed a partnership with several California-based funders to launch Propel*Next* California, with grants to a cohort of 15 organizations clustered in Los Angeles and the San Francisco Bay Area. Propel*Next* California has provided these organizations with the opportunity to test a regional approach and to generate a number of refinements to the program model.

Building on lessons learned from the first national cohort, a number of important refinements were made to program content and delivery for Propel*Next* California. Specifically, the consulting team adapted its approach to reflect the organizational characteristics and learning styles of the California grantees. Three key consultants working with the California cohort were highly involved in content design and coaching for the national cohort and shared valuable insights about differences and adaptations.

Organizational Diagnostic: Initial diagnostic to assess organizational readiness and identify priority areas for targeted support

Coaching: Individual and customized coaching and technical assistance

Learning Sessions: In-person group learning sessions designed to deliver content and support peer learning

Coaching Workshops: Small in-person workshops to apply learning, problem-solve, and share work with coaches and peers

Online Learning Community: Interactive online community to build connections and share resources

Performance Measurement Tools: Support implementation of data management system, reporting, and data use

Characteristics of California Cohort

Compared to the national cohort, the California grantees have smaller operating budgets and are leaner in terms of capacity and bandwidth. The California cohort also includes more multi-service providers with a heavier reliance on prescriptive public sector funding. While the regional model has some clear logistical advantages, EMCF and the consulting team anticipated greater competitive tensions, given the California cohort's reliance on similar funding streams, but was pleasantly surprised to see highly collaborative and collegial interactions. "I've seen lots of conversations around collaboration and how they could leverage what each other is doing," one coach noted. Another coach commented on the advantages of a regional approach, citing the grantees' ability to relate to similar external challenges and opportunities in a particular region and the logistical advantages of more face-to-face meeting time. Overall, coaches described the California grantees as open, enthusiastic, free thinking, entrepreneurial, and motivated learners.

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[1] For more information about the consulting team, see the Propel*Next* website at http://www.propelnext.org/our-program/consulting-partners/

Program Adaptations

In addition to adapting the coaching and instructional approach, several other enhancements were made to the model. While these refinements are still being tested, feedback from the first year has been positive and there are strong indications that these additions are creating a solid foundation for grantee success in the Propel*Next* program. Key adaptations include:

- **A more intensive and streamlined launch.**
  Unlike the national cohort, the California group had a more intense launch with more content upfront and an accelerated timeline for the development of the program model and TOC. As one coach noted, we wanted to see if we "can get this cohort there faster" with streamlined content and more support on the front end. While grantees described the pace as demanding and time-consuming, most expressed appreciation for the deadlines and structure that "propelled" them forward. Several coaches noted an initially steep learning curve for grantees, but stated that grantees demonstrated incremental progress as they began to wrap their heads around new
  concepts and the essence of organizational change. As one coach noted, there is a need for a lot of "rinse and repeat, rinse and repeat" to ensure grantees grasp the content.

- **Curriculum refinements.** Refinements to the curriculum included attempts to clarify concepts, provide more case study examples, develop more user-friendly templates, and dedicate more time to walking grantees through the process. Grantee survey results from the large group sessions were positive, and the consulting team has clearly worked hard to refine the content and presentation of materials to meet the diverse needs and learning styles of participants. "The content was super on-point," noted one grantee, "that was my favorite part, learning all the concepts."

- **Addition of small group coaching workshops.** In addition to the three large group learning sessions, grantees participated in a series of three in-person small group coaching workshops throughout the year. The workshops provided grantees an opportunity to dive deeper into program content, share their work, and trouble shoot with coaches and peers in a small group setting. Each session included 3–4 grantee organizations and was 4–5 hours in length. The regional workshop approach has worked well for the California cohort, given their close proximity to each other.

- **New and improved online learning platform.** A new website has been developed to make connecting with the online learning community more user-friendly and accessible, including on mobile devices. The new website offers a mechanism for uploading and accessing documents in a central location on the site. Users are also able to post questions and engage in dialogue with others. Email alerts are sent out when new and relevant content is posted. Training and feedback sessions with the grantees have also taken place.

"I'm really excited about this California cohort. I feel like we've made a ton of changes and they are responding positively."

– Propel*Next* Coach

Grantee Progress in Propel*Next* California Program

LeadWell Partners, in partnership with EMCF, developed the Dimensions for Building a Learning Organization to provide a framework for assessing grantee progress in the Propel*Next* program. The five key areas in the framework include (1) program model and TOC; (2) program implementation; (3) data collection, reporting, and use; (4) technology and infrastructure; and (5) organizational capacity for learning and performance management. In the first year, grantees are expected to achieve key milestones in the following areas:

1. **Program model and TOC.** The program model is articulated, drawing on research and evidence, with clearly defined target populations, program components, hypotheses, progress indicators, and outcomes. The initial TOC narrative is also developed and the implementation plan for pilot testing is put in place.

2. **Technology and infrastructure.** Technology (e.g., technical infrastructure and performance measurement tools) is put in place, and talent and training resources are identified to advance the regular practice of using data.

3. **Organizational capacity for learning and performance management.** Organizational leadership has demonstrated commitment to learning and performance management by investing in talent and resources to build a practice of learning and continuous improvement based on the systematic use of data.

Coach and grantee self-assessments indicate that grantee organizations have made solid progress in their first year. The year-end progress reports completed by coaches indicate that 60% of grantees fully achieved all three of the year-one milestones. The six grantees that received a "partially achieved" rating fell short of meeting the organizational capacity for learning and performance management milestone.

A common challenge for grantees that partially achieved this milestone is limited time and resources ("bandwidth," "mindshare," and "bench-strength") to devote to products and incorporate Propel*Next* learnings and tools into their organization. Several organizations also dealt with staff turnover, including anticipated departures, new hires, and promotions to meet shifting program needs. Several organizations struggled to move from short-term crisis management, often driven by the desire to be responsive to clients and funders, to a data-driven culture with clearly articulated models for programs and their organization as a whole.

Overall, grantees are absorbing content and are keeping up with the pace of Propel*Next* capacity building activities. A summary of progress and key highlights from the first year are outlined below.

- **Grantees are making steady progress despite initial learning curve.** A number of coaches recounted how grantees demonstrated incremental progress as they began to wrap their heads around new concepts and the essence of organizational change. According to one coach, "They have struggled along the way" but "they have exceeded my expectations in writing up their theories of change." While grantees have been able to keep up with deliverables, several coaches noted that grantees would

#1 Program Model and Theory of Change:
100% of grantees "fully achieved" this milestone

#2 Technology and Infrastructure:
100% of grantees "fully achieved" this milestone

#3 Organizational Capacity for Learning and Performance Management

60% of grantees "fully achieved" this milestone

40% of grantees "partially achieved" this milestone

benefit from more time to process information and reflect. One coach observed, "They've certainly written everything down on paper; I think they've done a really good job, they're right on track," but went on to say, "I don't think they've had time to reflect." Another coach noted that some grantees haven't had sufficient time for "letting go" of what they've been doing for years to fully process a new way of thinking.
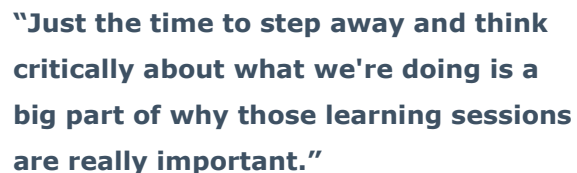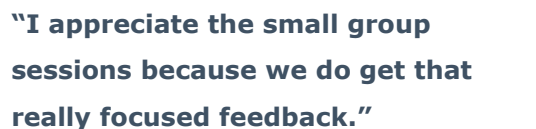
- **The sequencing is on point with a few exceptions.** According to most grantees, the sequencing of content and activities was on the mark, with the exception of the data system development. One grantee observed, "Doing the database in year one, it's too much and it's not the right timing because you're creating this database and you don't even know what your TOC is, what your program model is. You don't know what you're measuring and yet you're designing this thing." Several grantees thought it would have been helpful to hire a data and evaluation manager first, so he or she could be involved in the process. Last but not least, grantees with school-based programs struggled with the due dates for deliverables, which didn't align with their programming and clashed with the demands of fiscal year-end reporting.

- **Grantees described the pace as intense but manageable.** When grantees were asked about the pace, most described the process as intense but manageable. Coaches concurred that the pace was intense and observed most grantees struggling with limited bandwidth. As illustrated in the journey map on page 7, the activity and pace, particularly from January to May, was described by many grantees as challenging and grueling. A few grantees would have liked additional time to complete more extensive research, to conduct site visits with other nonprofits doing similar work, and to secure funding for their new programs. Several grantees mentioned that it would have been helpful to have a better understanding of how much time they should anticipate spending at key points throughout the process.

The vast majority of grantees talked about how Propel*Next* has challenged them to grow as leaders and noted clear evidence that new knowledge, thinking, and practices are being infused into their organizations. One grantee said, "This is probably one of the first times in my career at the helm that I was pushed from a funder, but for all the right reasons," with the added benefit of knowing that "if we get to implement this it's going to be a game changer for our young people." The impact of Propel*Next* has gone beyond their initial milestone goals.

The journey map on the next page provides a graphic illustration of major milestones and achievements during the first year. In addition to regular engagement with their coaches and tasks related to key deliverables, organizations participated in multiple peer learning convenings and small group coaching sessions since the initiative launched in August 2015. ⊞

> **"One of the big things is this really strong message of focus and intentionality that we've been able to gain through the Propel*Next* experience."**
>
> **–Propel*Next* Grantee**

"I appreciate the small group sessions because we do get that really focused feedback."

– Propel*Next* Grantee

CA Cohort Launch
August 2015

Organizational Diagnostic Site Visits
Summer 2015

Small Group Coaching Workshop 1
December 2015

Small Group Coaching Workshop 2
February/March 2016

Small Group Coaching Workshop 3
April 2016

Data Management System Launch
May 2016 – Systems go live, but not yet launched to all users

Data Report Site Visits
June/July/August 2016

2015

2016

Group Learning Session 1
October 2015 – Articulating the program model & introducing TOC

Group Learning Session 2
January 2016 – Developing the hypothesis & metrics for TOC

Program Model Developed
March 2016 – Organizations submit the final PM worksheet to coaches

Group Learning Session 3
May 2016 – Advancing the journey & building a community of practice

TOC and Implementation Plan Developed
May 2016

"Just the time to step away and think critically about what we're doing is a big part of why those learning sessions are really important."

– Propel*Next* Grantee

"We were basically putting together the theory of change, launching the pilot, and getting clarity about our budget picture all at the same time. That definitely felt overwhelming."

– Propel*Next* Grantee

Propel*Next* Strategies

What facilitates or supports grantees' progress in the Propel*Next* program? What hinders grantees' progress?

Propel*Next* is designed to support results-driven capacity building through a blended learning program that helps grantees "bring the learning home." When asked about the value and impact of various capacity building supports, grantees and coaches agreed that it's the additive formula that makes Propel*Next* a truly powerful program. This section highlights reflections from grantees and coaches about the benefits and value of each component, as well as challenges and opportunities for improvement.

Individualized Coaching and Technical Assistance

Both grantees and coaches referenced one-on-one coaching as the most critical ingredient for translating learning into practice. In particular, grantees appreciated being challenged to think critically about their program model and to be more intentional and strategic in their decision making. They also recognized and valued the technical coaching related to program design and data use and the training on organizational development issues. Several grantees expressed appreciation for the coaching team's ability to quickly recognize underlying organizational issues that can hinder progress, with one noting the ability "to read the tea leaves of our organization so accurately." Executive directors specifically appreciated the executive-level coaching on managing organizational change, talent management, and cultivating a learning culture.

While coaching was hailed as a key asset of the program, grantees and coaches alike offered suggestions for strengthening the coaching component. Many of these suggestions have already been discussed and integrated into practice, modeling a true commitment and example of the test, learn, and adapt mindset. Key lessons and reflections from the first year include:

- **Carve out time to understand grantee context.** Several grantees noted the importance of understanding their target population, the realities of engaging high-risk youth, and the external factors that impact their work. Naturally, some coaches had a better grasp of the context and local issues than others. Grantees acknowledged that each coach brings different strengths to the table and appreciated the opportunity to hear the perspectives of different coaches in the small group workshops. Still, they felt more time could be invested up front to better understand the context in which they operate. Although more time would be ideal, time and resource constraints are a limiting factor.

- **Clarify and reiterate expectations.** Grantees expressed the need for more clarity about expectations, decision making, and the vetting process. Nearly all grantees expressed frustration with the feedback and review process for the program model and TOC, noting that the coaching team was not always on the same page and often the feedback was inconsistent. While grantees understood the iterative nature of the process, most felt frustrated by the contradictory feedback given, especially after investing significant amounts of time and energy adapting to earlier advice. One way to address this issue is through earlier and more direct touch points between the grantee, coach, and LeadWell. A few grantees also mentioned

> **"A lot of consultants come in more as a physical therapist than a physical trainer. A coach has more of a physical trainer approach . . . 'We're not here to heal and restore something that needs to be fixed, we're here to take a healthy body and get it even more fit.' . . . You do need more of that physical trainer approach."**
>
> **– Propel*Next* Grantee**

struggling with power dynamics and the lack of clarity around decision-making authority. One grantee said it would be helpful to differentiate between suggested and mandatory change. In retrospect, many grantees came to appreciate revisiting and revising their models, but they grappled with who ultimately makes the final call. One asked, "Do I have the power as the grantee to ultimately make the final decision [about my program model]? Sometimes that felt a little fuzzy."

- **Guide, coordinate, and engage the coaching team.** Earlier in the year, coaches expressed the desire for more information and greater proactive guidance about coaching support strategies. While the team is composed of seasoned consultants, several were new to the Propel*Next* model and appreciated guidance to ensure they were *supporting* the work and not *doing* it. They expressed the need for more guidance and peer learning among coaches on the nuances between coaching and consulting. One coach said it would be helpful to spend more time with the other coaches talking about what it means to be a coach in this model versus other capacity building models, noting "a professional learning community among coaches could be really powerful." Another suggested that coaches could be better leveraged for their specific areas of expertise and more actively engaged in the large group learning sessions. As the year progressed, these suggestions have been discussed and integrated as part of coaching retreats and program delivery. This exemplifies how Propel*Next* is embracing and modeling the test-and-learn approach in real time.

Performance Management Systems and Technical Support

Grantees view the data system and support as a major achievement and described the technical assistance of coaches as navigators, translators, advocates, teachers, and visionaries. In particular, they valued the technical support negotiating contracts, interfacing with data vendors, and translating technical language into something staff can understand. Several grantees said their data system has been one of the most valuable assets they've gained to date. One grantee noted that, without the technical support, the "database never would have happened because it's so far out of my knowledge base." Grantees also found the data site visits and guidance in the summer of 2016 particularly useful. As one grantee noted, the "feedback was just so rich. I am sorry that we didn't record it because we have pieces of brilliance in notes but . . . her ability to ask deeper questions based on the information, based on the data plan, really really helped us."

While grantees and coaches see tremendous value in building the infrastructure systematically to collect and use data, the process and timing has not been without challenges. For some grantees the biggest pain points were related to external factors, namely, the acquisition of one data vendor by another, creating confusion and communication delays. Key lessons and reflections are highlighted below.

- **Adjust intensity and timing of support.** Getting data systems up and running with the first cohort was incredibly time consuming for grantees. With the California cohort, the data system assessment and support was implemented early in the process, and more emphasis was placed on building the capacity to develop and use data reports rather than the tedious work of data mapping and system set up. However, most coaches and grantees agreed that the introduction of the data system and mapping process was still out of sync and should follow the development of the program model. A few grantees also said they wished they were encouraged to hire a data manager during the design phase to help with

> **"We were going merrily on our way with what one [coach] said and then we're going merrily on our other way. Then by this time you're no longer that merry about it. There's really different advice and you don't disagree with any of it, it's just not the same."**
>
> **– Propel*Next* Grantee**

the development of the system. A couple grantees requested follow-up support once their data systems were up and running.

- **Adapt technical assistance to better reflect capacity and timing considerations.** Grantees started Propel*Next* with varying degrees of staff capacity and understanding about data systems. Some had existing systems and data managers, while others had limited capacity and no systems in place. Grantees with more capacity felt the technical support on the front end was more intense than what they actually needed. One grantee explained that their TA coach eventually realized that "but up until that point it was a little bit too intense for staff. But again, we got there. We have a good system. We're still working on tweaking it and making it better." A couple grantees mentioned the specific challenges of being a multi-service agency and trying to roll out a new data system for just one program. As one grantee described, "We're in the process of implementing our new system, but just with our [Propel*Next* program], which is getting really complicated because we share a lot of those clients with other people . . . We're working towards moving the whole organization over, but we need to get our [program] clients first, so now it's just a little tricky."

Large Group Learning Sessions

The large group learning sessions serve as an important venue for delivering core content and cultivating a community of practice. During the first year, grantees, along with coaches, consultants, funders, and alumni presenters, participated in three off-site convenings. Grantees expressed accolades for retreat-like settings and the opportunity to get away from daily distractions and focus on learning, connecting, and reflecting. Many grantees noted that the presentations were well-executed and efficient vehicles for delivering content. Grantees also praised the peer breakout sessions, structured networking activities, and fishbowl presentations. One grantee described the "masterful" way the coaching team adapted in real-time based on the plus/delta feedback from the day before.

Dates	Year 1 Learning Topics	Location
Session 1 (Oct 2015)	Articulating program model and introduction of TOC	Santa Cruz
Session 2 (Jan 2016)	Developing hypothesis and metrics for TOC	San Diego
Session 3 (May 2016)	Advancing the journey and building a community of practice	Santa Cruz

Overall, grantee feedback has been highly positive and the consulting team has worked hard to refine the content and delivery to meet the diverse needs and learning styles of participants. More emphasis has been placed on interactive and multi-modal approaches with ample opportunities for reflecting and engaging with peers. The consulting team also noted efforts to reduce the use of jargon and provide simple, accessible, and streamlined content.

Grantees valued the face-to-face time to connect and lamented the inability to bring more of their team members to the session. While grantees understood the cost implications, they regretted not being able to share the experience with others in their organizations.

Other key lessons and reflections from the first year are outlined below.

- **Grantees value opportunities to learn from the Propel*Next* alumni network.** The California cohort has the benefit of learning from the first national cohort of grantees and overwhelmingly praised the opportunity to engage with alumni and learn from their experience. The alumni network is clearly viewed as a valuable resource and their participation in the learning sessions was lauded as a major strength. The California cohort expressed keen interest in continuing to engage and learn from their peers.

- **The peer learning approach inspires grantees in multiple ways.**
  Both the large group and small group coaching sessions provided dynamic venues for grantees to learn new information, share their thinking, and test ideas. Several grantees noted that the Propel*Next* peer-learning approach inspired peer-learning components in their own program models, and they hope to replicate the approach with youth. Grantees expressed interest in having small group opportunities to share information among organizations with similar programs (e.g., workforce or school-based). These suggestions are already part of the plans for year two.

- **Coaches seek opportunities to actively contribute to large and small group sessions.** Initially, coaches had limited roles in the first two learning sessions and grappled with how to effectively contribute. During interviews in the spring of 2016, coaches expressed a desire for more clearly defined roles during large group sessions and for more advanced notice about content to better support learning and consistent messaging. The lead consulting team has been responsive to feedback and has actively sought ways to better leverage the time and expertise of the coaching team. In subsequent learning sessions, coaches were observed facilitating break-out sessions, serving as scribes, presenting content, providing small group coaching, and engaging grantees in reflective discussions.

- **Grantees may benefit from more targeted networking and breakout activities.** Several grantees suggested they could get more out of the sessions with structured "match-making" in which grantees are strategically connected with others who may have a shared interest or common challenge. Grantees suggested a range of potential groupings, including by single-service and multi-service agencies, size of agency, similar program areas and target populations, and geography. Grantees (or coaches) could also be surveyed prior to large group sessions to determine topics that are "top of mind." The learning session in September 2016 has already incorporated many of these suggestions.

Small Group Coaching Workshops

The small group coaching workshops represent a new learning strategy that has received high praise from both grantees and coaches. Coaches described the workshops as opportunities to apply what grantees are learning by sharing their work and receiving feedback in a more intimate setting. The small group workshops also provide a venue for peer learning, collective problem-solving, and cultivating a community of practice. Given the small size, workshops have been more interactive than the larger group settings and have been characterized by rich dialogue and more balanced participation. Grantees appreciated the opportunity to bring more team members to the discussion and the sense of accountability that comes with sharing their progress and pain points. Several grantees appreciated the "diversity of opinion" and the opportunity to concurrently hear from both coaches and peers.

Additional small group insights and suggestions are shared below.

- **Offer increased clarity about how to prepare and who should be involved.** Earlier in 2016, coaches noted there could be better advance communication and clarity about agenda topics and expectations for the small group sessions. Both coaches and grantees were thoughtful about coming prepared. However, as one coach noted, it "wasn't always clear what we were supposed to do when we showed up." Additionally, a few executive leaders mentioned that the workshops were not always useful

"We're still learning about how to make the large group sessions more effective."

– Propel*Next* Consultant

"At the end of the small group coaching sessions, it felt like you just did a really intense workout . . . but at the end you feel good. I always felt like I walked away with more clarity about my program model or armed with the right questions."

– Propel*Next* Grantee

for them personally, but they appreciated how helpful they were for program staff. Several grantees requested further clarification about workshop topics and who from their staff should attend. Plans are already in place to do this in year two, and both configuration and content will shift to respond to the next phase of capacity building. One grantee also suggested that they could host the workshops at their agencies on a rotating basis. This will provide an opportunity for peers and coaches to better understand the context in which they work.

- **More preparation for the critical feedback process.** Even after attending a few small group workshops, some grantees felt overwhelmed by the experience and grappled with how to process critical feedback. As one grantee expressed, "Sometimes it's overwhelming with the rapid fire questions and straight up criticism [on something] that you worked really hard on." While acknowledging the discomfort, these same grantees reflected on how the process has helped them grow personally and professionally. For future sessions, the consulting team may explore ways to create a more supportive environment for groups struggling with how to process critical feedback.

Online Learning Community

Grantees described the online learning community (OLC) as a user-friendly centralized platform to access materials, share insights, raise questions, and provide virtual peer support. While the OLC was noted as vastly improved and "beginning to bear fruit," some coaches felt that some grantees were not taking full advantage of the site or using it to connect with others. For some grantees, the lack of available time and comfort with online platforms has limited their engagement with the OLC, but it has served as a centralized repository for resources and relevant information. Analysis of OLC data from September 2015 to September 2016 shows that a large number of grantees are engaging with the platform throughout the year and at various levels. EMCF provided the Google Analytics-sourced graph on the next page. It represents a weekly display of visits to the OLC from September 16, 2015 to September 15, 2016.[2] Other highlights include:

- **Sharing documents and updates.** The level of engagement with the OLC varied by grantee, but most agreed it is a useful complement to other learning supports. For some grantees, online is not their "preferred mode" to learn and connect with others. However, the majority of grantees agreed that it is helpful to have a common space to access learning materials, register for the learning sessions, and share articles. A few grantees appreciated having an established space to connect when there wasn't a scheduled in-person meeting. One grantee described it as "therapeutic" and reassuring to know that others are experiencing similar issues. As shown in the graph on the next page, there is a high rate of website visits considering that this is not a public website and requires a password to enter. There is a surge in use before and after group learning sessions and small group coaching workshops, for which grantees need to register or download documents in advance. This echoes grantees'

"Small group coaching, far and away, has been the best because you get a mix of coaching and peer-to-peer dialogue. It's generally a critique of a specific deliverable . . . not a theoretical exercise."

– PropelNext Coach

"I love the online learning community . . . I actually like reading the discussions people are having. Unfortunately, I don't always have the time to contribute the way I would like to."

– PropelNext Grantee

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[2] Website visits from alumni and coaches could not be excluded from this graph, but some PX team visits are excluded.
[3] Source: Small World Communities Platform Reports, 09/16/2015 to 09/15/2016
Note: This data is representative of CA Cohort Grantees only.
[4] Includes replies and views by all users from 09/1/2015 to 08/31/2016.
[5] Includes unique searches by all users from 09/1/2015 to 08/31/2016.

feedback about the usefulness of the OLC as a central repository. As illustrated in the graph, however, correspond to top discussion posts, learning session reflections, and congratulatory posts for specific grantee organizations.

CA Cohort Year 1 OLC Peak Website Visits

⬭ = Event information or deadline ⬭ = Discussions and other key posts
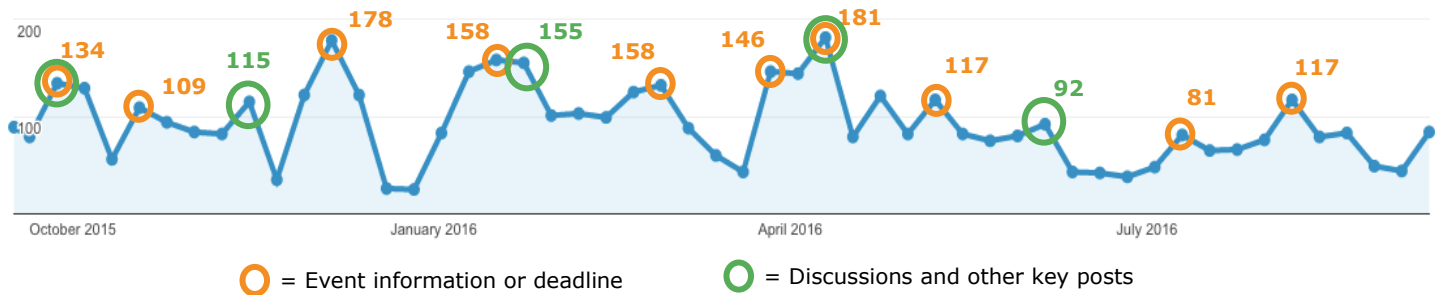
- **Showcasing grantees' work and experiences.** Suggestions from the feedback survey include adding more content that highlights the grantees' work and experiences navigating Propel*Next*, as well as sharing program models and sample TOCs. EMCF and the consulting team have been responsive to grantee feedback, uploading TOC examples from previous cohorts to the OLC and planning ample opportunity for interaction among peers at both large and small group coaching sessions.

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Different grantees initiated a discussion thread. A total of **127** replies from **27** grantees occurred as a result of those threads.[3]

The posts that garnered top views and replies were: **"Your Path into the Youth Development Field"** and **"Cohort Composition?"**[4]

The 5 most common searches were:
1. Program model
2. Case management
3. Theory of change
4. Positive youth development
5. What works guide[5]

- **Exploring more rapid and brief Twitter-style responses.** Some grantees found it hard to carve out time to engage with the online learning community. One grantee suggested having a Twitter-style approach with a 140 character limit, which might increase participation since people won't feel they have to craft a long post. Another suggestion was to improve the search function. A few grantees described that it was difficult to find a previous discussion thread or document using the search box. ✛

Building a Learning Organization

How and to what extent are grantees infusing Propel*Next* learnings and practices into their organizations?

Grantees are exploring a variety of strategies to build their muscle for testing, learning, and adapting. The majority of grantees talked about how Propel*Next* has challenged them to grow as leaders, and there is clear evidence that they are infusing new knowledge, thinking, and practices into their organizations. This section highlights key themes and reflections about stakeholder engagement, leadership, and organizational change from the perspective of grantees, coaches, and consultants.

Designing a clear program model has been an iterative process that pushed grantees to test their assumptions about target populations, program components, and outcomes. Despite the discomfort that comes with organizational change, grantees are learning to iterate, refine, and adapt their program models in the following ways.

Learning to Iterate, Refine, and Adapt

- **Embracing the grapple.** While at times frustrating, grantees repeatedly said they appreciated being pushed to think deeply and critically about their program model. "I do think the coaches are a tough bunch," said one project director reflecting on the small group workshops. "Sometimes that process was difficult. I'm not going to lie. That's not to say I would change it though because I felt challenged professionally." Another project director expressed how the "grapple" helped them become much more clear and intentional, noting "all the grappling has been amazing" and has led to some important breakthroughs and a-ha moments. "There has been an inherent push–pull, where you fight the inclination to take the program feedback personally. It feels personal, like it's yours; it's your baby." Others described the dueling emotions of being excited about improving the program while struggling to let go of how things were done in the past. Ultimately, the grapple has fueled personal and professional growth for many Propel*Next* participants, and they've appreciated being challenged to question their assumptions and think differently.

- **Clarifying program models, outcomes, and target populations**. Grantees are learning to clarify and differentiate different types of models (i.e., case management models and cohorts vs. group models) as well as the sequencing of programmatic events. They are also engaging in thought-provoking discussions about key terms, concepts, and conditions (such as clear criteria for program entry and exit). With guidance from the consulting team, grantees are being encouraged to articulate better alignment between their target population, activities, and outcomes and to be specific, clear, and comprehensive in developing their program model. This may entail making intentional and sometimes hard choices about who grantees serve in the program. As one member of the consulting team noted, grantees need to be willing and ready to put a stake in the ground, and they must understand they can't be everything to everyone.

> "It was new language, a new way of thinking. We needed program people to inform it. That translation was really difficult . . . It would have been much more efficient if we already had someone on the team that has the expertise."
>
> **– Propel*Next* Grantee**

> "We tend to describe our case management function as a 'do what it takes' approach, whereas Propel*Next* is like, no. What type of case management are you doing, how often, and to what end?"
>
> **– Propel*Next* Grantee**

- **Using data to prototype, test, learn, and refine.** The consulting team has stressed the importance of building a data culture and using data to learn what's working and what needs to be refined to improve results. Grantees are encouraged to focus and right-size their data collection efforts with an initial focus on assessing fidelity and gathering information to test their assumptions. As one coach noted, "There is a difference in the type of data you collect when you're prototyping. This is about gathering data to learn, reflect, and make modifications." Another member of the consulting team encouraged grantees to identify indicators that are "real-time signals of progress," or early signs that things aren't going as expected (like low participation rates). She suggested they "think about them as vital signs and not an autopsy." Grantees are also being encouraged to weave metrics "into a narrative story with context so it makes sense to people." Program managers and line staff need to see the value and utility in the data they're asked to collect. It's important to build in feedback loops and use data to improve program design, practices, and implementation. Overall, these messages resonate with grantees, but more time is needed to assess the extent to which grantee can put these concepts into practice.

- **Learning to identify and apply research and evidence.** While grantees understand the value of developing program models grounded in research and evidence, many struggled to track down evidence-based curricula and validated tools. Adding to the difficulty, some grantees are engaged in "pioneering work" with populations for which there is limited literature and research to draw from. Grantees are eager to access tools, particularly validated social–emotional measures, and have an appetite for insights and information about other programs and models. Grantees will likely need more support and guidance as they determine how research and evidence will influence and inform their program.

"We're in a very different place now—just a year later—we're having conversations (with staff) about continuous improvement and change."

– PropelNext Grantee

Managing Stakeholder Engagement

- **Engaging staff and creating awareness.** A few grantees have been using staff meetings and retreats as venues to engage staff, share what they're learning, and model exercises from the PropelNext large group learning sessions. Coaches have also been asked to join staff retreats to facilitate discussions about various PropelNext components. According to one grantee, "We did an all-staff retreat where we had all the programs in the agency do their own program model exercise. We've tried to transmit a lot of the learning that we got from the first two sessions to the staff." Other grantees talked about efforts to institutionalize the learning beyond monthly meetings or annual retreats. "We work closely with the department heads to ensure that, not only are we talking about this at retreats, but that it is really infused in the day-to-day."

- **Engaging the board and cultivating champions.** Many grantees are struggling to engage their boards and get buy-in beyond a few key members. Several grantees shared that their boards don't always remember the purpose of or fully appreciate the value in capacity building. "It was hard for the board to understand what we were talking about," one executive director noted, and, despite numerous presentations, stated, "It wasn't until we were spending a lot of our time and effort on this project . . . . Then people said, 'Wait a second, what is this?'" In some

cases, coaches or EMCF staff presented at board meetings, which grantees said was very helpful. During the recent learning session in September 2016, executive directors identified board engagement as an ongoing challenge and shared strategies for engaging their boards, including working with board champions to help with messaging and recruiting new board members who can more fully embrace "what we're trying to do and where we are trying to go."

- **Crafting messages and managing expectations.** At different points in time, grantees have been reminded about the need to manage expectations and the importance of "going slow to go fast." Many grantees mentioned the challenges of managing staff expectations about what it means and what it takes to become a learning organization. As one executive director reflected, "There was one session that was really emphasizing managing expectations and working to make sure staff are aware that the process isn't a flip-a-switch and everything's great. That session revolutionized how I was approaching onboarding staff. It gave me the tools and the context to say, 'Okay, I can bring this to the team if I frame it in the right way and if I'm really getting them on board with the idea.'" One program director reflected on messaging to program staff, some of whom are eager for change and others whom are reticent. "You need to set a foundation for this kind of work. We're not saying you do a bad job or that you have a crappy program or that you don't work hard enough. We're saying you've got a really good program and you're a good team, but we want to take you to the next phase, shift to another level."

- **Creating a culture of inquiry.** One year into Propel*Next*, grantees are talking about the ways the program is influencing their organizational culture. Some grantees highlighted the practice of data-driven decision-making and how it's trickling down to front-line staff who talk about programmatic decisions based on data and not just "hunches" or intuitions. Other grantees mentioned a more strategic approach to data use, focusing on impact rather than on counting widgets. "[We've] been collecting data for a long time," noted one grantee, "but it's been pieced together in a database that has focused on inputs rather than outcomes. I do think this initiative will build our commitment across the organization not only to collect data, but to use data to inform program design." For grantees with lots of prescriptive funding requirements, the shift from a contract compliance mentality to a learning orientation is significant. One grantee reflected, "We've been very focused on contract compliance," which has created unnecessary silos. "We're working on shifting to a culture of curiosity and learning, being thoughtful rather than more of the contrary 'let's move the widgets.'"

Adaptive Leadership and Navigating Change

- **Being an adaptive leader.** As executive leaders and program directors get ready for the test and learn cycle, there is a growing realization that they'll need to adapt their leadership approach to effectively manage both the anxiety and excitement that change brings. Several grantees noted their efforts to create an environment in which "people feel we're all in this together," and have a clear sense of the vision and values that drive change. Still, leaders recognize that change can breed fear and some staff simply aren't willing or able "to change the way they've done things for the last 10 years." While still in the early phases of change management, leaders are aware of the need to adapt their leadership, bring on new talent, and restructure roles to propel the organization to the next level.

"The biggest thing . . . for me is being intentional and putting a firm stake in the ground. You have to be very clear on what it is that you want to focus on and understanding that not making a choice *is* making a choice."

– Propel*Next* Grantee

The California cohort has found tremendous value in hearing from the national alumni and how they've navigated uncharted waters. They are eager to continue connecting with and learning from the alumni experience.

- **Developing the discipline to make tough and intentional choices.**
The highly structured framework for program development and the focus on credible evidence of effectiveness has helped grantees develop a more systematic and disciplined approach to decision making. As one grantee explained, by the time the TOC was submitted, "We had kicked all the tires . . . and now this car is going to start and make it down the road." For organizations that focus on crisis resolution, emphasizing strategy and impact is both exciting and daunting. Grantees also noted the need to explain their decisions and rationale to staff and board members, who sometimes questioned why certain components of the program have been eliminated. This requires a whole new set of leadership skills and muscle, including the ability to effectively engage internal and external stakeholders, to communicate effectively, and to manage the anxiety of change.

- **Cultivating and managing talent.** "The biggest a-ha for me was really about what capacity it takes," one executive director reflected. "I don't just mean the number of people or types of positions, but the 'who' that it takes to do this, and do this well. That was definitely an a-ha moment for me. You got to have the right people." Similarly, another grantee reflected on shifting their standards for hiring frontline staff. "I remember some feedback that I got from the prior cohort that you will not hire the same frontline staff that you used to. Your standards are going to change . . . and they did." They went on to note that they are investing more time in developing senior levels of staff and have redesigned compensation and selection criteria for new frontline hires. As grantees are exploring new roles and responsibilities, they are interested in receiving more guidance for assessing core competencies for existing staff and new staff and for learning strategies for leveraging the strengths of team members. ✛

> **"It's given us a stronger North Star in terms of what we want to be as an organization . . . and how we want to operate."**
>
> **– Propel*Next* Grantee**

Conclusion and Considerations for the Future

Grantees universally expressed gratitude for the opportunity to participate in Propel*Next*. "Folks around the table are just brilliant," observed on grantee. "It's an honor to participate." Grantees noted a range of intangible benefits, including the ability to communicate more clearly and effectively about their work, the credibility they've gained as a Propel*Next* grantee, and the belief that Propel*Next* is taking their organizations to a new level. According to one grantee, participating in Propel*Next* "has been a game changer for our agency" and current funders have noted how their organization is operating at a higher level. Several program directors mentioned how their participation in Propel*Next* has re-invigorated their commitment and passion for their work by creating new opportunities for professional growth.

Grantees also expressed appreciation that EMCF is modeling the "test and learn approach" and has created space for grantees to reflect on what's working and what could be done differently to improve results. Several grantees expressed interest in hearing more about alumni reflections and insights post-program, and one asked what EMCF and the investors are learning and grappling with. Grantees clearly see themselves as part of a broader learning community and are eager to listen, share, and contribute to building the field.

During the first year, there were five key challenges that grantees voiced at various points in time. These themes are summarized below.

1. **Time.** Grantees came to understand the intensity and time required to participate in and fully benefit from the Propel*Next* program. A few grantees made the decision to halt other programmatic activities and focus their energy on Propel*Next*. While grantees acknowledged they were told it would be time consuming, some organizations said that, for planning purposes, it would be helpful to receive more information upfront about the activities, deliverables, and stages that require more attention.

2. **Talent.** In addition to time, many grantees are grappling with how to cultivate and engage new talent to advance their programmatic and organizational work. Specifically, they are challenged to find or develop staff who can contribute to their data, learning, and evaluation goals. As grantees begin to pilot a more robust program, not having the right people in place to support performance management and data use is an issue.

3. **Resources.** Problems related to resources and sustainability is another looming concern for grantees, specifically regarding how to pay for new staff, evaluation directors, and more robust programming. Grantees are seeking guidance and insights from EMCF, coaches, and the alumni cohort for fundraising strategies.

4. **Alignment.** Some grantees are struggling to align contract and grant compliance from other funders with their new program models. Others are grappling with how to best align and integrate data-driven learning and performance management with the overall structure, culture, and practices of their organization. Some organizations are thinking as holistically and openly as possible about their programs; however, they are also trying to figure out how to balance systemic needs both internally and externally.

5. **Stakeholder engagement.** Grantees are grappling with how to build buy-in at multiple levels across the organization, including at staff, board member, strategic partner, and funder levels. Grantees are exploring ways to engage their boards and are using a variety of strategies to engage staff and build their muscle for testing, learning, and continuous improvement.

Given the real-time nature of this work, many of the issues and suggestions raised by coaches and grantees are already being addressed or are part of the learning agenda for year two. Moving forward, one of the ongoing goals is staying focused on the core work of Propel*Next* while supporting grantees as they navigate the diverse nuances of organizational change. As Propel*Next* grantees and stakeholders enter the second year, it's worth exploring what resources Propel*Next* can make available to help grantees more effectively manage organizational change efforts in both the short- and long-term. This may include identifying strategies to leverage and build the community of practice, strengthen peer networks, and maximize the OLC as a learning platform. Last but not least, there may be opportunities to enhance the selection process to better distinguish the type of support grantees may need to facilitate and advance their work in the Propel*Next* program. ⊞

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