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Learning Together: Cohort-Based Capacity Building and the Ripple Effects of Collaboration

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Introduction

For decades, grantmakers have recognized the importance of investing in nonprofit capacity to help organizations strengthen their effectiveness and fulfill their missions (Grantmakers for Effective Organizations, 2016). These capacity-building efforts come in all shapes and sizes, and typically focus on a range of core capacities, including leadership and program development, financial management, technology, human resources, communications, and evaluation and learning.

The field of organizational capacity building has evolved considerably over the years, yet assessing the impact of capacity-building supports on organizational effectiveness continues to be challenging. We have a solid sense of which strategies are immediately effective, but the longer-term impact is less clear. Some funders have described impact assessment as the “holy grail” or the “million-dollar question,” noting the confluence of factors that can influence capacity building and the inherent challenges of attribution (Pond, 2015). Furthermore, rigorous evaluations that examine both the evolution and impact of capacity-building efforts over a longer span of time are costly and complicated, given the dynamic environment in which nonprofits operate. As a result, most evaluations have tended to focus on shorter-term outcomes (e.g., knowledge acquisition and skill building) rather than meaningful but hard-to-measure impacts, such as improved program quality, enhanced organizational performance, and better outcomes for beneficiaries.

Key Points

- Foundations frequently commission evaluations and are the primary audiences for findings. Grantee organizations, however, often don't see the results, or they find in them limited value and relevance to their own work. Funders like the Edna McConnell Clark Foundation are quietly disrupting this status quo by exploring ways to fully engage grantees, co-funders, technical consultants, and evaluators in collective learning and reflection.
- The foundation's comprehensive, cohort-based capacity-building program, PropelNext, was designed to enhance the performance of promising nonprofits that serve America's disadvantaged youth. With a combination of financial support, individualized coaching, and peer-learning sessions, grantees engage in a test-and-learn cycle to promote a culture of learning and continuous improvement.
- This article explores what collaborative learning looks like in the PropelNext context and how foundations can “practice what they preach” by modeling a reflective practice, sharing what they're learning, and supporting evaluations that surface information that is useful to everyone. It also discusses findings related to collaborative learning for both a regionally based and a nationally based cohort. Finally, it highlights specific strategies and tools to promote collaborative learning and to leverage peer networks in ways that can accelerate change, strengthen funder-grantee interactions, and advance the field.

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

— Alumni CEO

Since 2000, the Edna McConnell Clark Foundation (EMCF) has made large, long-term investments to help high-performing nonprofits scale evidence-based programs that improve the lives of disadvantaged children and youth. In 2012, EMCF launched *PropelNext*, a signature capacity-building model designed to strengthen promising organizations whose programs had not yet been fully codified. *PropelNext* was designed to be an intensive, cohort-based program that emphasizes deep capacity building and intentional learning on multiple levels. With a combination of financial support, individualized coaching, and peer-learning sessions, grantees engage in a test-and-learn cycle that promotes a culture of learning and continuous improvement. A hallmark of *PropelNext* is the emphasis on creating a strong peer-based learning community.

To better understand both the potential of its strategy and the impact of its capacity-building investments, the EMCF commissioned a post-program study of its inaugural national cohort as well as a developmental evaluation of its second cohort, based in California. Both studies have revealed promising findings that build upon an evolving field and delve deeper into what it takes to optimize nonprofit performance. In addition to positive results for grantees, these studies have surfaced additional evidence that highlights the power and potential of cohort-based models to

deepen learning not only within individual organizations, but also across cohorts and the broader field. As Peter Senge (2006) posits in his seminal book *The Fifth Discipline: The Art and Practice of a Learning Organization*, organizations are dynamic entities and a change in one area often creates conditions for learning with ripples of change and reactions elsewhere in the organization. The same appears to hold true when grantees and funders come together and engage in deep and intentional collaborative learning.

The EMCF and its co-investing partners¹ have also been deeply engaged in the test-and-learn cycle along with grantees. This has required a willingness to “walk the walk” by modeling a reflective practice, sharing what they are learning, and supporting evaluations that surface information that is useful across multiple stakeholders. In this article, we highlight key findings from these two recent evaluation studies (Engage R+D and Harder+Company Community Research, 2018a, 2019), as well as specific strategies to leverage collaborative learning in ways that accelerate change, strengthen funder-grantee interactions, and elevate data-driven learning across the field.

The PropelNext Model

PropelNext is an intensive program that builds capacity through a strong, peer-based learning experience that typically includes 12 to 16 organizations. The 28 grantees in the first two cohorts were selected through an invitation-only process and underwent a rigorous review of their readiness to benefit from participation in the program. The due diligence process included structured site visits with several EMCF team members and the technical assistance provider who collectively assessed and compared notes. Organizations were selected based on their strong leadership, management capacity, and potential to boost effectiveness and increase impact on the lives of youth. The first and second cohorts of *PropelNext* grantees represent a geographically diverse cross-section of organizations working in a range of areas, including juvenile

¹ In the California Cohort, which completed in 2018, the co-investors were the William and Flora Hewlett, David and Lucile Packard, Sobrato Family, and Weingart foundations.

TABLE 1 PropelNext Grantee Organizations (2015 and 2018 Cohorts)

PropelNext Grantees	
National 2015 Cohort	California 2018 Cohort
<div>1. Blue Engine</div> <div>2. Carolina Youth Development Center</div> <div>3. Colorado Youth for a Change</div> <div>4. Domus Kids, Inc.</div> <div>5. DREAM</div> <div>6. Fresh Lifelines for Youth</div> <div>7. National Indian Youth Leadership Project</div> <div>8. New Door Ventures</div> <div>9. New Pathways</div> <div>10. Taller San Jose Hope Builders</div> <div>11. UTEC, Inc.</div> <div>12. Youth Opportunities Unlimited</div> <div>13. Youth Services of Tulsa</div>	<div>1. Alternatives in Action</div> <div>2. Asian Youth Center</div> <div>3. Beyond Emancipation</div> <div>4. Bresee Foundation</div> <div>5. Coalition for Responsible Community Development</div> <div>6. Community Youth Center of San Francisco</div> <div>7. East Oakland Youth Development Center</div> <div>8. Huckleberry Youth Programs</div> <div>9. Lavender Youth Recreation and Information Center</div> <div>10. Los Angeles Brotherhood Crusade</div> <div>11. My Friend’s Place</div> <div>12. Pivotal</div> <div>13. Reach Out</div> <div>14. Social Advocates for Youth</div> <div>15. Teen Success, Inc.</div>

justice, foster youth, homelessness, and student re-engagement, and serving youth with significant risk factors, trauma, and other barriers to reaching their full potential. (See Table 1.)

As part of a cohort, grantees receive common curriculum and capacity-building support over a three-year period from a dedicated team of seasoned coaches and consultants. They also receive grants to support individualized capacity building and to implement performance-management systems. Expert coaching, structured group-learning sessions, performance-management tools, and access to an online learning platform all round out a robust program. (See Figure 1.) Throughout the program, organizations design and pilot research-informed program models, develop theories of change (TOCs), and engage in a test-and-learn cycle to promote a culture of learning and continuous improvement.

FIGURE 1 PropelNext Supports

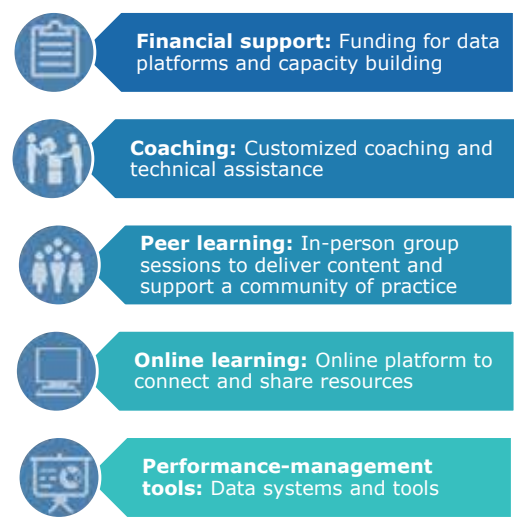
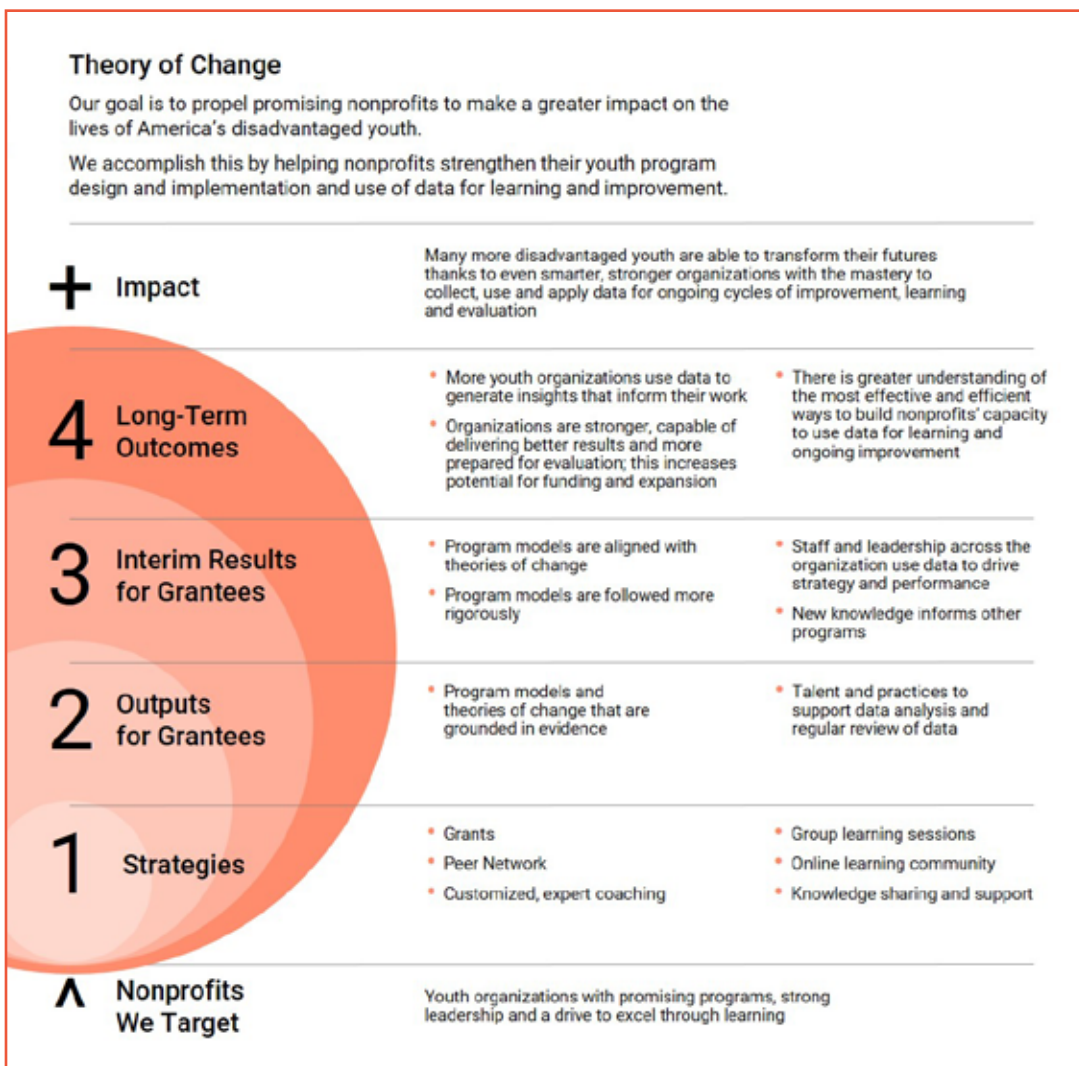


FIGURE 2 PropelNext Theory of Change

Program content is guided by the PropelNext TOC and a framework designed to assess grantee progress and track key milestones through various stages of the program. (See Figure 2.) Core program content includes designing and codifying data-informed program models, developing TOCs, identifying meaningful progress and outcome indicators, and implementing data-management systems and practices. Core content also includes an array of change-management issues as grantees embed a culture of learning and continuous improvement across their organizations. With this comprehensive collection of supports,

PropelNext seeks to strengthen the capacity of youth-serving nonprofits to deliver high-quality programs and services that ultimately produce better results for disadvantaged young people.

Evaluating Change

To better understand how PropelNext contributes to improved organizational performance, the EMCF partnered with Engage R+D and Harder+Company Community Research to assess post-program progress of the National 2015 Cohort, which participated from 2012 to 2015, and to concurrently conduct a

TABLE 2 Key Learning Questions

Post-Program Study of National 2015 Cohort	Developmental Evaluation of California 2018 Cohort
<div>1. To what extent have alumni organizations sustained the capacities they developed during PropelNext? What conditions facilitated or hindered their efforts?</div> <div>2. What role did PropelNext play in helping organizations build and sustain those capacities? What elements of the program were most influential in supporting gains and/or additional progress post-PropelNext?</div> <div>3. What have organizations achieved that can be attributed, in part or whole, to their experience in PropelNext? What unexpected achievements or challenges have occurred?</div>	<div>1. How are grantees progressing through PropelNext?</div> <div>2. What facilitates or supports grantees' progress in the PropelNext program? What hinders grantees' progress?</div> <div>3. How and to what extent are grantees infusing PropelNext learnings and practices into their organizations?</div>

Tools

developmental evaluation of the California 2018 Cohort, which participated from 2015 to 2018. Conducting the evaluations of the first and second cohorts in parallel provided a unique opportunity to cross-pollinate methodology and lift up real-time learning to inform the content and delivery of the program for the California cohort. (See Table 2.)

Using a collaborative approach to the evaluation design, the team worked with the EMCF, advisors, the implementation team, and grantee leaders to identify indicators of progress and success throughout and in the years following *PropelNext*. The evaluators also looked to the literature and sought to identify observable evidence and proof points where measurable change and shifts in practices could be documented. Contextual factors that may have propelled or hindered efforts to improve performance and fulfill an organization’s mission were also examined.

Both evaluation studies were aligned with the Dimensions for Building a Learning

Organization (DBLO) framework, developed by the EMCF in partnership with LeadWell Partners. While the DBLO rubric included progress indicators for the primary intervention (i.e., development of evidence-based program models, performance-management systems, and data-use practices), the indicators related to adaptive leadership, talent management, and shifts in organizational culture were less nuanced. To address this, the evaluation team leveraged select measures and proof points from Performance Practice,² developed by the Leap of Reason Ambassadors Community (2017). The combination of progress indicators and proof points from each framework allowed the team to drill deeper and better capture nuanced shifts in behaviors, practices, and mindsets in core capacity areas. (See Table 3.)

Quantitative and qualitative data were gathered from various sources at multiple points in time. Data collection included in-depth site visits with 27 organizations³ (12 from the National 2015 Cohort and 15 from the California 2018 Cohort); document review; meeting observations; and

² Formerly known as the Performance Imperative Organizational Self-Assessment, Performance Practice is a tool and framework to focus on key organizational principles and proof points that undergird and support high performance.

³ One of the organizations from the National 2015 Cohort did not participate in the post-program study.

TABLE 3 Key Levers and Dimensions for Building a Learning Organization

Key Levers and Dimensions for Building a Learning Organization	
Program Models and Implementation	<ul style="list-style-type: none">• Institutionalizing codified program models based on research, evidence, and data• Strengthening implementation fidelity and accountability• Listening and learning from program participants and beneficiaries
Technical Infrastructure	<ul style="list-style-type: none">• Using robust data systems• Strengthening capacity of front-line staff to use data effectively• Building an internal data and evaluation function• Reflecting and thinking critically about relevance and utility of data
Adaptive Leadership	<ul style="list-style-type: none">• Modeling and inspiring a learning and data-driven culture• Using data and research to inform organizational decisions• Exercising discipline and learning from failures• Engaging the board in learning and data-driven decision-making
Talent Management	<ul style="list-style-type: none">• Supporting and aligning talent with organizational needs• “Getting the right people in the right seats”• Engaging and empowering staff• Raising the bar and clarifying performance expectations• Institutionalizing new recruitment and hiring practices
Organizational Alignment and Integration	<ul style="list-style-type: none">• Using data to align programs and major initiatives with organizational strategy• Fostering cross-departmental learning and quality improvement• Systematically collecting and using data across departments and functions

surveys, interviews, and focus groups with organizational leaders, managers, front-line staff, board members, partners, and funders. Data from these multiple sources and perspectives were triangulated by the evaluation team and highlighted in a series of reports⁴ that summarized key findings and captured the journey of grantees as they cultivated a learning culture and embedded performance-management practices into their organizational DNA.

Building a Learning Organization: Key Findings

Organizational learning is a process that unfolds over time and is typically exemplified by

institutional cultures that encourage and support continuous improvement and experimentation. The PropelNext studies provide evidence that the road to high performance is an inherently disruptive process that challenges grantees to think in new ways and scrutinize the status quo. The practices that organizations learn in PropelNext are not “one and done” events, but rather long-term, multiyear undertakings to build cultures of learning and embed data-driven practices across organizations. While the initial focus of PropelNext is on designing and testing robust program models, the work extends far beyond programming and has profound implications for nearly every aspect of an organization, from

⁴The reports are available on the PropelNext website: <http://www.propelnext.org/what-were-learning/propelnext-evaluations>

strategy, leadership, and culture to talent management, operations, and fund development.

More than two years after completing PropelNext, alumni organizations identified a significant shift in how they approach their work. Leaders described their PropelNext experience as transformational and recognized that they are still “on a journey of discovery” as they strive to sustain, deepen, and spread practices across their organization (Engage R+D & Harder+Company Community Research, 2018a, p. 5). When asked about reverting to old ways of thinking, leaders openly acknowledged the inherent pull, but, as one CEO acknowledged, “[You] can’t go back to what you were before” (Engage R+D & Harder+Company Community Research, 2018a, p. 5). Some changes were seeded during the PropelNext program and began to bear fruit a year or two after the program ended. Specifically, alumni organizations have continued to invest in people, capacities, systems, and processes to more fully infuse learning and continuous improvement into their organizations.

Alumni organizations noted in particular the iterative nature of this work and provided tangible examples of post-program gains and capacities they have continued to strengthen in the years after the program ended. These findings suggest that this type of deep and comprehensive capacity building can have a lasting and transformative effect on organizational effectiveness. The post-program study of the National 2015 Cohort surfaced clear evidence of sustained impact and the ripple effect of PropelNext beyond program design and implementation to all aspects of the organization several years after program completion (Engage R+D & Harder+Company Community Research, 2018a).⁵

Well-Designed, Well-Implemented Programs and Strategies

A central thrust of PropelNext is to guide grantees through a rigorous process of designing, testing, and refining program models that are

“It’s an iterative process. 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.”

— Alumni CEO

data-driven, informed by research, and guided by a solid theory of change. Both evaluation studies revealed that organizations have made critical strides in codifying program models based on research with clear target populations, intended outcomes, dosage, and duration. Post-PropelNext, 91 percent of leaders indicated that their organizations use the best available data to develop and refine their programs. The majority (87 percent) said their organizations had since created individual or team positions that were responsible for monitoring implementation fidelity, compared to 11 percent before PropelNext. Organizations have also improved and sustained implementation fidelity by strengthening guidelines, engaging staff in data use, and providing more intensive supervision (Engage R+D & Harder+Company Community Research, 2018a).

While fidelity has generally improved, some organizations continue to face challenges (Engage R+D & Harder+Company Community Research, 2018a, 2019). For some multisite organizations that work across geographies, implementation fidelity is a heavier lift. Organizations that rely heavily on clinical interventions like case management also appear to face more challenges with fidelity. In these cases, assessing fidelity goes beyond tracking dosage or duration to focus on the quality of interactions with youth. These organizations required more intensive strategies for assessing fidelity, including relying on qualitative data, observations, or increased supervision.

⁵ The full report is available on the PropelNext website: http://www.propelnext.org/fileadmin/media/Propel_Next/PDFs/PropelNext_Alumni_Study_Full_Report.pdf

“We’re more intentional about making sure whatever we’re thinking [in terms of program implementation] is grounded in some type of best practices or evidence-based work.”

— Alumni Senior Leader

Other organizations have grappled with the reality that meaningful program outcomes for youth with complex needs take longer to achieve. One organization discussed the challenge of “telling their story” to funders who were eager to see “high success rates” immediately, noting that “if you choose to focus on more challenging populations, you’re going to be faced with data that isn’t always going to be as rosy” (Engage R+D & Harder+Company Community Research, 2018a, p. 10).

Systems, Infrastructure, and Capacity to Support Data Use

Organizations from both cohorts are now using more robust data systems and training front-line staff to use data to strengthen program delivery for at-risk youth. Staff members have increased their capacity and confidence to use, discuss, and think critically about the relevance and utility of data. To facilitate systematic data use and learning, nearly all organizations have developed and sustained at least one full-time position dedicated to this function (Engage R+D & Harder+Company Community Research, 2018a, 2019). The total number of learning and evaluation staff also increased, from an average of 0.5 full-time equivalent (FTE) positions in 2012 to 2.3 FTE positions in 2017 (Engage R+D & Harder+Company Community Research, 2018a).

Some organizations have struggled to find the right candidates to fill these positions and to find the balance between technical skills and the ability to facilitate more strategic data use

across the organization. They also acknowledged challenges to staff engagement and managing the natural anxiety about data use and organizational change. “There is always pushback from the line staff around changes,” one alumni leader observed, “and there are those who will say, ‘I liked how it was before.’” (Engage R+D & Harder+Company Community Research, 2018a, p. 32). Other leaders talked about seasoned staff who at times struggled to adapt to new responsibilities and requirements. One recalled having to tell tenured managers that “you’re new at this, and you have to go through the learning curve ... so you can teach and model to your staff” (Engage R+D & Harder+Company Community Research, 2018a, p. 32).

Adaptive Leadership That Inspires and Models a Learning Culture

Organizational leaders have a clear and unfettered understanding of the critical role they play in modeling and inspiring a culture of learning by encouraging people throughout their organization to be curious and data-driven. As one executive director noted, “We are the culture keepers, the people who can spread the culture of learning and curiosity” (Engage R+D & Harder+Company Community Research, 2018a, p. 22). Another commented that “we model that kind of behavior all the time in what we do” (Engage R+D & Harder+Company Community Research, 2018a, p. 22).

Interviews and survey results indicate that leaders have increased the frequency and regularity in which they share data and results with staff and board members (Engage R+D & Harder+Company Community Research, 2018a, 2019). This includes creating space and conditions to both celebrate successes and learn from experiences that didn’t go as planned. Before *PropelNext*, these practices were not consistently applied and leaders acknowledged relying on intuition rather than data to make operational and strategic decisions. The majority (61 percent) of leaders from the National 2015 Cohort and 70 percent of the California 2018 Cohort expressed this was not a regular practice prior to *PropelNext*. After *PropelNext*, 89 percent of the National 2015 Cohort and 94 percent of the

California 2018 Cohort indicated that they were substantially or fully implementing this practice. Staff corroborated the data collected from leaders in nearly all measures, providing additional evidence of notable shifts in behavior, greater openness to learning from mistakes, and making decisions based on data (Engage R+D & Harder+Company Community Research, 2018a, 2019).

According to leaders, PropelNext is fundamentally about change and transformation, calling for sharper skills and agility to effectively navigate both the challenges and opportunities change often brings. One executive director acknowledged, “change management is very complex and we’re all completely under trained on it. It’s happening all the time, so it seems like an area where we could have done a lot more work [in PropelNext]” (Engage R+D & Harder+Company Community Research, 2019, p. 24). Nearly all organizational leaders expressed the need for more focus and training on change management.

Talent and Expectations Aligned With Organizational Growth and High Performance

In his book *Good to Great*, Jim Collins (2001) underscores the critical importance of human capital and coined the now famous phrase, “getting the right people in the right seats.” Throughout PropelNext, grantees reflected on opportunities to develop staff and identify areas that required new talent to propel them to the next level of performance. At the beginning of the program, the concept of talent alignment was not really on the radar for most organizational leaders. Two years after PropelNext, organizations from the first cohort have made notable strides in this area, with 86 percent of leaders indicating that they made substantial progress “getting the right people in the right seats,” and 81 percent reporting that the practice of communicating standards of excellence and accountability was substantially or fully implemented (Engage R+D & Harder+Company Community Research, 2018a).

Interviews with organizational leaders also revealed some of the inherent challenges in

“Data is in almost everything we do . . . I am able to then use all that data to plan much more targeted interventions than if I didn’t [have that data].”

— Alumni Staff

raising the bar and efforts to recruit qualified staff. Several leaders mentioned elevating salaries to attract and retain talent, as well as establishing higher standards in the recruitment process. Other leaders discussed the challenges of managing staff expectations and clarifying pathways for growth when performance standards are high. Said one program director,

For better or for worse, we’ve gotten a lot more strict about what it means to manage a person, and that a manager title doesn’t just get thrown at you because you’ve been here a long time or because you want it. You have to meet all of these criteria to show us that you’re ready for that before you get the title. (Engage R+D & Harder+Company Community Research, 2018a, p. 33).

Efforts to get “the right people in the right seats” have not been easy. In fact, many organizations from both cohorts experienced considerable staff turnover during and after the PropelNext program. While turnover in the nonprofit sector is nothing new, a number of grantees reported that at least some of the departures were a result of their efforts to transform their organizational practices and culture. While painful at times, organizational leaders have tried to use transitions as an opportunity to make structural changes, refine job responsibilities, change recruitment practices, and strengthen their approach to staff development.

Intentional Efforts to Integrate Learning and Data Use Across the Organization

Organizations highlighted a variety of mechanisms and processes to promote alignment, collaboration, and integration across programs,

“Anyone who manages anyone here has to be able to show concrete evidence of ability and a history of using data to learn and improve performance in some way or another.”

— Alumni CEO

departments, and job functions, including organizational theories of change and strategic plans driven by research, analysis, and stakeholder engagement. They have broken down silos by creating cross-agency teams focused on quality improvement and by using data, discipline, and structured processes for making operational and strategic decisions. Staff shared how their data-system reports help not only in gauging program effectiveness, but also in driving improvement in all facets of their organizations. Before *PropelNext*, 59 percent of organizational leaders said that this practice was not started or partially met, with 30 percent unable to assess. Since *PropelNext* there has been a shift, with 84 percent of leaders reporting that their organization has substantially or fully implemented this practice (Engage R+D & Harder+Company Community Research, 2018a).

To help infuse and spread data-driven learning throughout an organization, leaders have stressed transparency and communicating the value of learning and continuous improvement across often fragmented programs and departments. Organizations from the California 2018 Cohort said *PropelNext* has fueled cross-agency collaboration, which was noted as one of their most significant achievements. According to one executive director, “*PropelNext* revealed gaps and weakness that have been under the surface for a long time — not just about data, but about how we work together and coordinate” (Engage R+D & Harder+Company Community Research, 2019, p. 32) Specifically, *PropelNext* surfaced places in their continuum of services where

youth fall through the cracks, and helped them become more “youth-centered” rather than “program-driven” (Engage R+D & Harder+Company Community Research, 2019, p. 35).

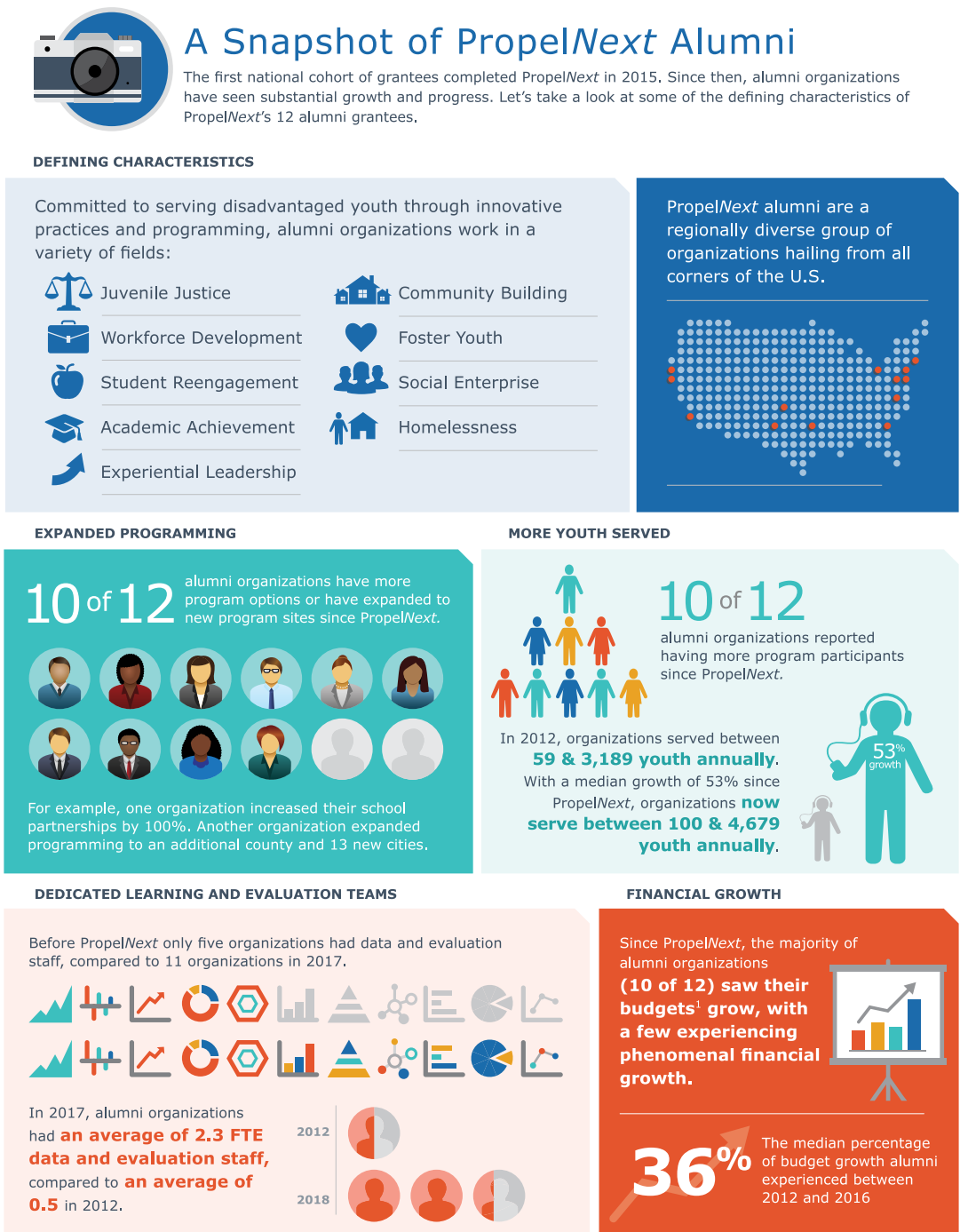
Sustaining, Strengthening, and Communicating Impact

Funders, board members, and partners cited expansion and serving more youth as the most noteworthy achievements of the National 2015 Cohort since participating in *PropelNext*. (See Figure 3.) Ten out of 12 alumni organizations are now serving more youth, with a median growth of 53 percent. Organizations have also increased their program options and have begun to grow their programs through partnerships and expansion into additional geographic sites. One organization doubled the number of school partnerships, while another expanded programming to 13 new cities. Over three-quarters of alumni organizations have secured new sources of funding and/or retained funding from existing funders. Ten out of 12 organizations have increased their budgets, with a median growth of 36 percent between 2012 and 2016.

Funders and grantees alike noted improvements in the quality of funder-grantee relationships and in the quality of interactions with institutional and community partners. Nearly all grantees from the National 2015 Cohort said *PropelNext* has helped them bring much more clarity to their work and, as a result, equipped them with better information and an enhanced ability to tell their stories. Some mentioned creating improved, results-focused annual reports and learning to talk to boards and funders in more compelling ways. Nonetheless, most organizations — particularly those from the California 2018 Cohort — see external communications and data-driven storytelling as areas for growth (Engage R+D & Harder+Company Community Research, 2018a, 2019).

Despite an overall uptick in funding, some organizations expressed concern about their ability to financially sustain their growth as they have struggled to attract larger sources of regional or national funding, due to their geographic focus and/or lack of rigorous external evaluations. As

FIGURE 3 Key Findings From National 2015 Cohort



“It gave us an opportunity to both communicate and evolve a cross-section of the staff in some key decision points moving forward ... it was comprised of folks from advancement, training, instructors, case managers, employment folks [and] finance.”

— Alumni CEO

an organizational partner put it, they are “too big or too mature for local funders, but not big enough for national funders” (Engage R+D & Harder+Company Community Research, 2018a, p. 44). Organizations that depend on public-sector funding have also struggled, and, given the current policy environment, things seem likely to get worse before they get better. One commented, “The budget for the state over the last five years has almost been flat funding. Maybe 1 percent or 2 percent, but, essentially, the costs of the program are going up but the funding isn’t keeping pace with it” (Engage R+D & Harder+Company Community Research, 2018a, p. 44).

Reflections on the PropelNext Model

To better understand the “secret sauce” of PropelNext, the evaluation team continuously surveyed both cohorts about the components and attributes that have been most impactful in propelling them forward. Across the board, grantees appreciated the structured approach and accountability of PropelNext, pushing them to accomplish things they otherwise would not. The combination of intensive supports is part of what makes PropelNext a powerful program, but according to leaders from both cohorts, the most critical components have been (1) the customized

coaching, (2) a trusting and supportive relationship with their funders, and (3) relevant content bolstered by peer learning. The evaluation revealed the important role funders play in modeling best practices and “walking the walk.”

Customized, high-caliber coaching helps to accelerate and embed the application of generalized knowledge into organizational practice. PropelNext grantees receive guidance from experienced coaches who bring a unique mix of experience in organizational development and leadership, deep understanding of the nonprofit sector, and strong management and specialized technical expertise. The coaches are well-positioned to provide targeted support to grantees because they are seasoned professionals with extensive experience in developing and implementing performance management systems and processes, including dashboards, score cards, and other data-driven learning tools to support continuous improvement.

The coaching component was consistently ranked as the most valuable aspect of PropelNext — specifically, the thought partnership, fresh perspective, candor, and ability of coaches to anticipate blind spots and challenges organizations would encounter down the road. Grantees appreciated hearing the “hard truth” and how coaches “pushed you in uncomfortable but productive ways” (Engage R+D & Harder+Company Community Research, 2019, p. 40). A leader from the California 2018 Cohort said, “There’s no substitute for having somebody regularly checking in ... There’s been a few other [capacity-building] programs that I’ve been part of where there’s been some component of that, but it hasn’t been nearly as comprehensive or as in depth as what is provided with PropelNext” (Engage R+D & Harder+Company Community Research, 2019, p. 40). Many organizations have maintained contact with their coaches and have sought advice, refresher workshops, and support during organizational transitions.

Foundations that strike the right balance between high standards and responsiveness create a solid set of incentives for authentic partnerships and high performance. Alumni found

the EMCF team to be transparent and highly responsive. Said one:

I truly have such tremendous respect for the foundation ..., the role modeling of having high standards, being demanding, hard work ... being stretched beyond what we thought we were capable of in the beginning. The hard part was there, but there was also great humility. (Harder+Company Community Research, 2017, p. 11).

Grantees said they felt heard and that the foundation struck the right balance between accountability and flexibility. “I felt very inspired to meet a funder that had both the sophistication and the humility that really made it safe to be vulnerable, to pull apart who we were, what we were doing, and putting it back together” (Harder+Company Community Research, 2017, p. 11). Grantees appreciated the EMCF’s ability to create an environment that fostered vulnerability and openness to sometimes sensitive conversations. “I never felt judgment,” one CEO noted. “They really created a safe space for that to happen, and, in fact, I felt like the more honest and vulnerable I was, the more enriched the relationship with EMCF. That’s a unique experience” (Harder+Company Community Research, 2017, p. 11).

Well managed cohort peer-learning opportunities can incentivize collaboration and help elevate the field. The cohort-based model created a strong peer-learning experience and sense of community, both within and across cohorts. Over time, alumni developed trusting, transparent, and supportive relationships as well as a shared language and experience. One leader reflected, “[F]or us as an organization, everything happens in the context of a relationship,” and the opportunity to come together on a regular basis — to “go out to dinner and have drinks on occasion ... really developed a trust where agencies were willing to take risks in doing business differently” (Harder+Company Community Research, 2017, p. 10). Another CEO commented that the level of trust created important space for peer learning, support, and growth: “As a CEO, there’s not a lot of places where you can be super

“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.”

— Grantee CEO

transparent and vulnerable, and so it’s nice to have that space” (Harder+Company Community Research, 2017, p. 10). And one California grantee responded, “Overall, what we found to be the most beneficial was the peer learning, both from our current peer group as well as the National cohort” (Engage R+D & Harder+Company Community Research, 2019, p. 40).

Peer learning as well as a pervasive culture of reflection and responsiveness have been a common thread throughout PropelNext. Using real-time and rapid feedback loops, the PropelNext team continuously responded to grantee feedback, adapting the content and format of large group-learning sessions. This included peer-to-peer breakout sessions during large group convenings that allowed executive directors to meet and discuss role-specific issues, while program leaders connected with their peers on topics most relevant to their role and function within the organization. Executive directors discussed strategies for engaging their boards, building leadership teams, and managing organizational change, while program and operational directors had deeper discussions about program implementation and data use. There were also opportunities for organizations with similar program models to engage in discussions, group problem solving, and deeper connections with peers. Grantees said they found it reassuring to talk to other members of

the cohort who were facing similar organizational or programmatic challenges, and that they often left learning sessions feeling energized and equipped with new tools, strategies, and solutions. Each organization sent two to three people to each learning session, thus allowing them to more readily “bring the learning home” and strategize ways to infuse that learning within their organizations.

PropelNext has also leveraged experiences and insights across cohorts by creating opportunities for alumni to share both their trials and actionable insights with current cohorts. In fact, most of the California cohort grantees said the best and most meaningful presentations at the learning sessions came from the alumni, as opposed to expert speakers. Half of those grantees have proactively connected with alumni outside of learning sessions to share materials and resources, meet in person, or conduct site visits. One California grantee commented, “Having access to the past 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” (Engage R+D & Harder+Company Community Research, 2018b, p. 15).

The Ripple Effects of Collaborative Learning

As part of the second cohort, the EMCF pursued a collaborative co-investor model to incubate and launch a regional approach in California, providing unique opportunities for learning and experimentation among funders. The four California-based foundations — the William and Flora Hewlett, David and Lucile Packard, Sobrato Family, and Weingart foundations — have all been notable champions of organizational effectiveness and were eager to participate in testing and learning at both the grantee and funder levels. They brought their own questions about the model and unique insights on how the PropelNext initiative compares to other capacity-building programs. Throughout the three-year period, funders attended the grantee learning sessions and participated in regular

funder meetings to discuss their reflections and observations. Like the grantee cohort, the funder group was equally engaged in a test-and-learn cycle.

Interviews with the co-investors revealed aligned values and a shared commitment to strengthening the organizational effectiveness of the nonprofit sector. They were excited to be part of a funder learning community, explore other capacity-building approaches, and enhance their own internal grantmaking practices. Each brought thought-provoking insights and questions to the table and helped to incorporate new content, such as beneficiary feedback and more attention to equity and inclusion. One funder expressed interest in cohort-based learning: “There’s power in the cohort model if it’s managed well, if there’s sufficient room for the organizations to really learn from each other, and if the incentives are set up the right way” (Engage R+D & Harder+Company Community Research, 2018b, p. 12). At least two of the funders have since launched cohort models similar to PropelNext, but on a smaller scale. One reported piloting an 18-month cohort for increasing evaluation capacity, while another took lessons learned from PropelNext and implemented a “financial resilience cohort” aimed at helping grantees move toward systemic change.

In addition to the co-investor model, the California 2018 Cohort also provided an opportunity to test a regional approach with grantees clustered in the Los Angeles and San Francisco Bay areas. Grantees, funders, and coaches all cited multiple benefits of regional clusters, including bringing more resources to the area and strengthening the capacity and networks of youth-serving organizations. Despite the potential for competitive funding tensions, grantees were highly collaborative — partnering on funding opportunities and openly sharing programmatic, operational, and training materials. There are promising signs the cohort model and the new regional focus are fostering collaboration and enthusiasm about field-building. One director said, “We’re hoping that the things that we are learning will help us become leaders in the field among our peers,” (Engage R+D &

Harder+Company Community Research, 2018b, p. 13). This shared commitment and sense of responsibility for building a sector that delivers better outcomes for youth was echoed by other California grantees.

Conclusion and Implications for the Field

In the fall of 2018, the EMCF and five co-investors⁶ launched the third *PropelNext* cohort with 12 grantees clustered in Northern California. They are continuing to test, learn, and build evidence for deep and intentional learning that propels organizations to higher levels of performance and, ultimately, better outcomes for beneficiaries. More than five years after launching the first cohort, alumni organizations have continued to build muscle and core competencies for performance management, resulting in notable shifts in organizational practices, behaviors, processes, and culture. While the combination of intensive and comprehensive supports is part of what makes *PropelNext* a powerful program, both the high-caliber coaching and the cohort-based peer-learning model were acknowledged as “game changers.”

There is also strong evidence to support the ripple effect of deep and intentional learning—not only within individual organizations, but across organizations and funders on multiple levels. *PropelNext* has provided fertile ground to test and document the often-overlapping ripples of learning and collaboration within organizations, across organizational peer groups (i.e., CEOs, program leaders, learning and evaluation staff), and among funders working in the same or adjacent areas of interest. These ripple effects have the potential to elevate the broader field as new standards of performance are replicated and spread to other organizations. With encouragement from the EMCF, alumni organizations have developed a strong sense of community as well as a willingness to lend their support to the *PropelNext* cohorts that follow in their footsteps. As one leader put it, “We would jump at any opportunity to collaborate. We’re

like the [Harvard Business School] graduates that stay in touch for 50 years” (Engage R+D & Harder+Company Community Research, 2018a, p. 48). Others recognized their role and responsibility to advance the field and improve outcomes for at-risk youth. “[We’re] part of elevating the nonprofit sector,” said one executive director, working “to create a new standard of doing things for our most vulnerable kids” (Engage R+D & Harder+Company Community Research, 2018b, p. 1).

⁶The co-investors for the cohort in Northern California are the William and Flora Hewlett, David and Lucile Packard, Sobrato Family, and Heising-Simons foundations.

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