W. Clement & Jessie V. Stone

Education Grantees Convening 2012

THE PATH TO SCALE: IDEAS FOR NAVIGATING NONPROFIT GROWTH

Prepared by Education First

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W. Clement and Jessie V. Stone Foundation: THE PATH TO So	CALE
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This report summarizes conversations at the W. Clement and Jessie V. Stone Foundation's 2012 convening of its education grantees, held in Chicago, Illinois, in October 2012.

Founded in 1958, the Stone Foundation honors its founders' vision to change the world and make it a better place for this and future generations. It seeks to work with great leaders doing promising work that has the potential for advancing the knowledge and practice in three grantmaking fields: early education, K-12 education and youth development. In education, the foundation's grantmaking strategy is focused on strengthening the human capital in urban schools by addressing the effectiveness of teachers, the leadership skills of principals, and the managerial and analytic talent needed at multiple levels of the school system. See www.wcstonefnd.org.

Education First helped plan and facilitate the meeting as well as prepared this summary report. Education First uniquely helps policymakers, advocates and funders develop broad-based improvement and reform strategies to inspire and engage all students to graduate from high school and postsecondary studies prepared for a competitive world of constant change and innovation. See www.education-first.com.



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INTRODUCTION

The W. Clement and Jessie V. Stone Foundation hosted its fifth annual education grantee convening in Chicago, October 16-17, 2013. The meeting continued the foundation's efforts to support a robust learning community among its education grantees, all of whom work toward improving the effectiveness of educators. (See Appendix A for the list of the Stone Foundation's education grantees.)

The foundation designed the meeting to probe the specific challenges and possible paths forward that education organizations face as they grow, expand their reach and work to deepen their impact—themes the foundation has helped its grantees explore in annual meetings since 2008. At the 2012 convening, grantees candidly discussed change management strategies, organizational sustainability, evaluation and measurement, and communications. Specifically, the meeting was organized to accomplish these objectives:

- Reflect and apply lessons for successfully managing scale and deepening organizational development
- Identify solutions to specific nonprofit management challenges
- Strengthen the network of grantees as a learning community

To provide a concrete example and context for the discussions on scale and organizational challenges, the foundation commissioned a brief case study of the New Teacher Center, one of its education grantees, describing the center's growth since its founding in the late 1990s. In addition to the case study, Roger King, an independent consultant who sits on the board of directors of the New Teacher Center, presented a framework and insights into how organizations can plan for scale. Pranav Kothari, managing director of Mission Measurement and an expert on nonprofit evaluation, and, Sarah Durham, founder and principal of the communications and marketing firm Big Duck, shared strategies and consulted with grantees on specific growth management dilemmas. (See Appendix B for speaker biographies.)

This report summarizes some of the key challenges and advice discussed during the convening that can guide nonprofit organizations as they pursue their own path to scale.

PATH TO SCALE

To provide a framework for nonprofit leaders, consultant Roger King offered a proposed "path to scale" that described key milestones in an organization's growth. King, a management consultant formerly with Bain & Company, now works exclusively with nonprofit organizations that have the potential to go to scale. He advised and supported City Year as it grew dramatically in the early 1990s, and since then he has worked full time to help several other nonprofit organizations scale up, including Stone Foundation grantee the New Teacher Center.

Scale Defined

King's presentation opened with a discussion of how best to define scale in the nonprofit sector. He acknowledged that many different conceptions of scale exist, but he offered his own definition to frame the presentation and encourage discussion. According to King, achieving scale means "realizing a substantial portion of the full potential of a concept or program," which should include five components:

- Wide geographic spread
- Broad adoption (large customer base, high penetration)
- Powerful and full program implementation
- Sustainability
- Wide recognition (strong brand and general public awareness)

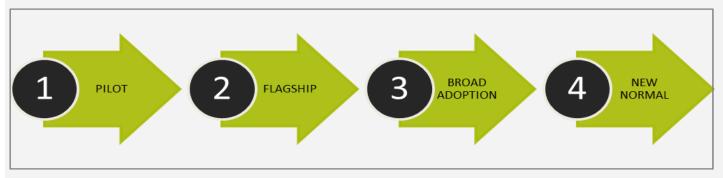
Although all five components are needed for an organization to reach its full potential, very few organizations are at scale in all five areas; in particular, said King, most nonprofits fail to achieve full program implementation and broad adoption. The result, he argued, is "the non-profit sector features a thousand precious pilots, but no new brands."

Moreover, King added, nonprofit leaders sometimes think that they must choose between either scaling an organization or disseminating their ideas for improving schools. However, he said, "If you want to scale an idea or concept, you can't do it without an organization" that is behind this work. Ideas don't enter the mainstream without an organization in place working relentlessly to implement them.

How Organizations Scale

Based on his work with several nonprofit organizations helping them successfully navigate growth challenges and achieve broad adoption of their services, King has developed a "path to scale" framework that describes four major phases, as illustrated in Figure 1 below.

Figure 1: King's Path to Scale for Nonprofit Organizations



W. Clement and Jessie V. Stone Foundation: THE PATH TO SCALE

Each phase includes the following characteristics:



During the **Pilot** phase, an organization tests and perfects its intervention, products or services (its "widget," in King's short-hand phrase). This phase can last two to three years, as an organization works with a handful of sites to test the initial idea, intervention or service. Resource needs are modest, ranging from \$2-\$10 million each year depending on the service, and most revenue comes from grants and donors.



In the next phase of growth—the **Flagship** phase—a nonprofit organization focuses on high-quality delivery of its products or services to dozens of sites. The focus is on figuring out ways of successfully implementing the idea or product in multiple sites with different conditions. Organizations can stay in this phase for five to 10 years, as they develop the management and infrastructure needed to guarantee implementation in different settings with fidelity to the original idea. Annual investments to sustain the organization can be \$20-\$30 million, through a

mix of both grant and fee-for-service funding.



Once it has enough evidence—and confidence—behind its model and how to successfully support it in multiple settings, nonprofit organizations move into the **Broad Adoption** phase. Here, the focus is on successfully selling products or services to hundreds of sites (to achieve widespread use). With less inward focus on creating the right infrastructure to support growth, this phase emphasizes technical assistance to client sites. Also during this phrase, an organization will find it has many imitators because its impact is powerful in most settings.

With revenue now based mostly on fees to sustain (rather than grow) the back office, this phase can require an annual investment of \$5-10 million.



The final step and ultimate goal for growing nonprofit organizations is the **New Normal** phase. At this stage, an organization's products and services are broadly disseminated, widely used and universally respected in the sector. Rather than being an outside-the-system solution, the organization's products and services are now seen as state of the art and best practice—and the organization's approach influences education policies, funding and regulations. With a self-sustaining business model still mostly supported by fees for its services or products, annual

revenue is about \$5 million to continue to serve hundreds of early-adopting sites with lighter touch support.

The youth development organization Boys and Girls Club—with its national footprint and proven approach that has largely influenced how afterschool programs are offered around the country—is one example of a program that has achieved the New Normal phase in education, according to King.

Only a small fraction of non-profit organizations can be expected to get to scale like the Boys and Girls Club, King added—they need both "eye-popping value," in his words, and a sustainable business model. Organizations also need to move deliberately from phase to phase and not skip steps. King cautioned against the tendency in the nonprofit world to pursue Broad Adoption before the Flagship phase. Too many organizations sell ideas still being perfected and vetted in the Pilot phase to policymakers for adoption into public policies. Most times, it's too soon to move to that quickly—the delivery vehicle hasn't been perfected and the evidence base is weak, he explained.

CASE STUDY: The New Teacher Center

To help meeting attendees more readily apply Roger King's "Path to Scale" framework to their own efforts, the Stone Foundation commissioned a case study of The New Teacher Center, a grantee that has achieved significant influence and wide adoption over the past decade.

A belief that teachers are the single most important school-based determinant of student success—and when teacher effectiveness increases, student learning improves—animates the work of the New Teacher Center. Its mission is to accelerate the effectiveness of new teachers specifically and, since its founding in 1998, it has served 85,000 new teachers.

Starting at the University of California-Santa Cruz, NTC set out to improve the effectiveness of new teachers by boosting retention, improving teaching practices and increasing student learning. Within 10 years of its founding, NTC had a best-in-classroom induction program and a national reputation. It also was influencing and supporting state and federal policymakers and educators across the country. In 2009, recognizing its growth and accomplishments, NTC became an independent nonprofit organization separate from the university—which also caused it to prioritize creating a stronger internal business and management operation.

Now, with this internal capacity-building effort largely completed and the organization thriving successfully outside the university, NTC leaders are focused on what specific steps are needed to increase its impact—and what business model, staffing and services will support greater impact and further reach.

Today, the New Teacher Center pursues its mission by offering services and advice to school district leaders and policymakers in four main areas:

- Mentors: NTC cultivates a corps of teacher mentors who provide intensive developmental support to new teachers
 and act as change agents to shift the culture of teaching and learning in their districts. NTC has created an online
 mentoring program called eMentoring for Student Success to support new math, science and special education
 teachers.
- *School Leaders*: NTC provides support to principals to help them become strong instructional leaders, encourage new teachers, and create a positive teaching and learning environment in their schools.
- Districts: NTC builds capacity within school districts, so they can design, and over time, run effective new teacher induction programs. Working at a local systems level creates the right conditions for effective teaching and learning.
- *Policymakers*: NTC educates and provides technical assistance to policymakers to improve teaching and learning conditions, and encourage widespread adoption of effective teacher induction programs.

NTC is increasingly focused on supporting the development of new teachers in understaffed schools and targeting its efforts at the nation's 200 largest public school districts. In 2011, NTC worked with 24,195 new teachers total across all programs, touching nearly 1.5 million students, supporting induction programs in 35 states and approximately 250 school districts.

EXPERT CONSULTATION: Making Sense of Data

Pranav Kothari of Mission Measurement worked with grantees to suggest better ways of managing data to inform decision-making. Evidence and data become more and more important as organizations grow—but many struggle to organize and interpret increasingly large amounts of information about different facets of their programs, implementation progress and outcomes.

Kothari offered the following advice:

- As organizations grow, leaders increasingly feel they are managing too much data. The key to figuring out what to pay attention to is ensuring any data are tied to the organization's growth, planning, program development and resource allocation goals. Also know the audience of each body of data collected (such as internal management or external funders).
- Be proactive with funders, including the organization's outcomes framework in any letter of inquiry to potential donors. Make the first move with respect to the outcomes discussion with funders and what you plan to evaluate and why.
- Make sure metrics are tied to outcomes that the organization cares about, especially as it grows and evolves over time. Outcomes are expressions of values.
- Use data to inform practice. Beware of "untethered metrics"—information you collect that is interesting but doesn't really help improve program delivery or design.
- Once you have your outcomes data, be clear about how and who to communicate it with, and how you use it internally.

SCALING CONSIDERATIONS: MOVING TOWARD NEW NORMAL

On King's "Path to Scale" framework, the New Teacher Center is at the tail end of the Flagship phase and moving toward Broad Adoption, according to founding CEO Ellen Moir. Its core product has been support for new teachers (and the mentors who coach them) as they enter the classroom.

Since its inception, NTC has confronted a number of challenges—common to growing organizations—as it grows and scales its work, including:

- Figuring out its "widget"—the exact mix of products and services to offer client school districts (as well as the right fees to charge client school districts)
- Growing geographically, while maintaining quality and a high-functioning organization
- Staffing a growing organization with new talent and experience
- Identifying the right measures to track progress, success and impact at each phase

Figuring Out The Widget

Moir acknowledged moving from phase to phase at NTC hasn't always been intuitive. "At the Pilot phase," she recollected, "we were a group of educators with no business knowledge. We were afraid to codify anything because it would mean we would be a cookie cutter program. Once we started to grow outside the state of California, codifying our project was a huge and necessary leap forward." From there, NTC began moving forward with further pilots in New York City, the Charlotte-Mecklenburg school district in North Carolina and a small district in Maryland—and these advances caused NTC to further streamline and clarify its product.

The most important aspect for the Pilot phase is getting the organization's widget right, according to King; "widget" is his short-hand description of the core service, approach or product an organization offers. Ultimately an organization may expand to offer multiple products, but the initial focus should be on developing one and ensuring it can make a difference in schools, he advised. King also observed that, for many nonprofit leaders, the initial challenge is deciding on which widget to focus.

EXPERT CONSULTATION: Communicating Your Brand Effectively

Sarah Durham of Big Duck spoke with the Stone Foundation grantees on the topic of effective communication strategies for nonprofit organizations. As organizations grow, telling their story, explaining their results, and reaching new clients and donors becomes increasingly important—and nonprofits can adopt some of the best practices of major corporations that have mastered the art of marketing.

Durham provided the following tips for the grantees to strengthen communications and marketing efforts:

- communications as Think of everything organization does to explain its work, whether it's how you reach out to potential new donors, communicating progress with existing supporters, or explaining your program design to school leaders. government Too often. nonprofit organizations manage these communications independent of each other—and the lack of unifying messages and themes shows.
- Make sure everyone internally is clear about the organization's communications strategy—and assign intentional communications roles. Communications should be a priority among all staff members. Very few small, just-starting-out organizations need a media relations person; only when an organization has a \$2-3 million budget should it look for a designated communications person.
- With the advent of social media, nonprofit organizations should think of themselves as "thought leaders" in the sector, using social media tools to advance the conversations and understanding about their issue. At the same time, it's important to remember that social media is a "hungry animal": If you don't feed these new tools, they will die or attack you. In other words, when there is no or low activity, it sends the signal that you aren't paying attention or well organized.
- In terms of prioritizing resources, first develop a good strategic plan, then develop good branding, and then build a good website. Organizations should budget to overhaul their website every two to three years to keep up with the speed of technology and the Internet.

When moving from the Pilot to Flagship phase, the focus shifts to assessing the widget's impact, said King, and making adjustments to ensure a stronger product that can thrive in a variety of settings with less day-to-day involvement from the central office. "The widget itself has to be good to begin thinking about moving to Flagship," said King. An organization is ready for Broad Adoption once it has enough data and confidence in the widget it has developed and tested. "Before we grew, we had six to 10 years building this out in our backyard where we had total control," shared Moir.

Growing Geographically

As organizations expand regionally and eventually nationally, they must consider how they "codify" their widget—to ensure fidelity and quality. At the same time, King counseled leaders to understand that their widgets should become "productive mutations" over time that find new ways of better reaching diverse clients while maintaining overall quality. NTC Chief of Staff Tirzah Enumah shared, "As we grow across districts, we have to really think about what we codify. How do we customize yet keep the integrity of the program? Often times what works for one location won't work for another."

When considering where to expand geographically, look for locations that will make the program stronger and will provide the opportunity for success. That may mean avoiding large cities with their cumbersome bureaucracies or states with unstable school funding formulas. Or, as King counseled specifically, "Large cities like New York City, Los Angeles and Chicago should be saved until the tenth expansion site." He added, "Scale in cities where champions or funders are in your court." Each new location for expansion should strategically help an organization strengthen its widget and support structure.

Staffing a Growing Organization

Moving from phase to phase often requires staff and leaders with new skills and experiences. "Sometimes the people you work with in the Pilot phase aren't the same as those needed in the Flagship phase," Moir observed. King added that, as organizations move from Pilot to Flagship stages, organizational leaders should expect as much as a third of the people involved to leave (including staff, board members, funders and clients), another third to be thoroughly energized with the changes, and a final

W. Clement and Jessie V. Stone Foundation: THE PATH TO SCALE

third willing to adapt to the changes. "Build your path to scale with a more modest batting average. When you start a new program, you begin with your family and friends, but as you grow you need to ensure the right people are on your team," noted King—and that likely means finding others with new skills.

Indeed, when building staff, both King and Moir counseled, deliberately seek out new expertise rather than individuals with similar views and experiences as founding staff members. And, when expanding to new sites, organizations should bring on people with deep business management and fundraising experience; too often, new staff members with programmatic experience are selected over those with the skills needed to navigate an organization's operational growth and maturity. As organizations expand, they need to have leaders and team members with the management expertise to build a larger, sustainable, high-functioning organization.

Measuring Impact

Organizations seeking to scale their efforts must be critically focused on measuring their results, gathering data to improve their efforts and communicating their impact. "As you develop and scale your programs, you will be constantly collecting helpful data to inform you in the direction you intend to go. The data illustrates the outcomes for what you intended to accomplish," explained measurement expert Pranav Kothari. He added, "Outcomes should be an expression of a program's value; data should be an expression of an organization's execution." Knowing the types of data that will be needed to show the program's outcomes and knowing how to collect that data are two imperative pieces for moving to scale successfully.

As an organization moves to scale, it must consider to what degree it is making changes tied to what it does. However, an organization can look to research from other similar organizations or interventions to inform this decision making; studying the results of similar efforts working in similar situations can prove valuable, especially, given the expense of conducting intensive program evaluations in particular. "For example," Kothari suggested, "research may tell you that if teachers change their instructional practice in a certain way, we have seen material improvements in student achievement, preceded by changes in school culture. Then, look for indicators in your own work to see whether you are seeing (or not!) seeing evidence of the desired changes in teacher practice and school culture. Those intermediate term data can be important leading indicators as to progress on your ultimate desired impact."

CLOSING REMARKS FROM THE EXECUTIVE DIRECTOR

January 2013

Dear Colleagues:

These convenings have become a signature event for the Stone Foundation, and we are pleased to share this report widely among colleagues and grantees. We are particularly grateful to Bill Porter and Heidi Lenzo of Education First Consulting for their willingness to work on many iterations of the report. We are particularly grateful to our board of directors who took a chance that these convenings would have merit and meaning for our grantees.

This convening was the most valuable of all that we have held and reflects the seasoning process that we have all gone through as a group. We began these convenings back in 2008 not exactly sure of what we wanted to accomplish except to bring all our brilliant, thoughtful grantees together and provide a forum for connection and communication. Over the years the convenings have evolved to meet our grantees' needs, and the foundation has been in a position to provide expertise on issues of great interest to our grantees. Along the way, the convenings have created an atmosphere of parity and trust between grantmaker and grantseeker. The conversations have grown richer, the insights deeper and the connections substantive.

As I say goodbye to my work here at the Stone Foundation, I am truly humbled by the work of our grantees. These are really exceptional leaders, who not only have the courage and smarts to think big, but equally important the will to implement in the complex work of public schools. I will miss them all. On behalf of the Board and staff, I must say that it has been a real honor to support them in their work.

Warm personal regards,

Sandra Treacy

Executive Director

<u>APPENDIX A: W. CLEMENT & JESSIE V. STONE FOUNDATION</u> 2012 EDUCATION GRANTEES

- Academy for Urban School Leadership
- Boston Plan for Excellence (BPE)
- Center for Collaborative Education
- Chicago Public Education Fund
- Education Pioneers
- Internationals Network for Public Schools
- National Equity Project
- New Leaders
- New Teacher Center
- New Visions for Public Schools
- Partners in School Innovation
- San Francisco Teacher Residency
- Strategic Literacy Initiative, WestEd
- Teach Plus
- University of Chicago Urban Education Institute
- University of Illinois at Chicago Urban Leadership Program
- Urban Teacher Residency United

APPENDIX B: 2012 CONVENING SPEAKER BIOGRAPHIES

SARAH DURHAM, founder and principal—Big Duck

www.bigducknyc.com

Sarah Durham grew up in the advertising, design and marketing worlds. In 1994, it was time for her to put communications best practices to work for a better reason: to help nonprofits increase their visibility, raise money, and move the needle on their missions. So she made her escape and started Big Duck. Today, Big Duck is the leading communications firm that works exclusively with nonprofits. Clients include local, regional, national and international organizations. Sarah is a total nonprofit communications nerd. She was named a top fundraiser under 40 by Fundraising Success Magazine in 2006, and one of the most influential women in technology by Fast Company magazine in 2010. She's a regular speaker at Association of Fundraising Professionals and Nonprofit Technology Network conferences. The author of *Brandraising: How Nonprofits Raise Visibility and Money Through Smart Communications* (Jossey-Bass/Wiley, 2010), Sarah teaches aspiring nonprofit communications nerds at NYU's Wagner School (where she is an adjunct faculty member) and at the Athena Center for Women's Leadership at Barnard College.

TIRZAH ENUMAH, chief of staff—New Teacher Center

www.newteachercenter.org

Tirzah Enumah has served as chief of staff at the New Teacher Center since 2010. In this role, she supports the CEO and the organization in a number of areas, including development, strategic planning, human capital development, and internal and external communications. Prior to joining NTC, Tirzah spent a short time in the District of Columbia Public Schools' Teacher Human Capital Strategy Team, where she worked on the implementation of the then new teacher assessment system. Earlier in her career, Tirzah taught, recruited and managed teachers and programs at a startup organization that provided academic and college readiness support to underserved students. Tirzah holds an M.B.A. from the Stanford Graduate School of Business, an M.A. in Education Policy, Organization, and Leadership Studies from the Stanford University School of Education, and a B.A. in English from Yale University.

ROGER KING, consultant

Roger King has worked with non-profits on strategy, going-to-scale, and organizational development since the early 1990s. He was a consultant with Bain & Company, an international strategy consulting firm, from 1983 to 1992. He holds an A.B. and an M.B.A. from Harvard University. His current and former clients include City Year (Boston, MA), Civic Ventures & Experience Corps (San Francisco, CA), Developmental Studies Center (Oakland, CA), Institute for Research & Reform in Education (Philadelphia, PA), New Teacher Center (Santa Cruz, CA), Playworks (Oakland, CA), Strategic Literacy Initiative at WestEd (San Francisco, CA), Healthleads (Boston, MA), Project ECHO (Albuquerque, NM), Collaborative for Academic, Social & Emotional Learning (Chicago, IL) and Cornerstone Literacy (New York, NY).

PRANAV KOTHARI, co-founder and managing director—Mission Measurement

www.missionmeasurement.com

As co-founder and managing director of Mission Measurement, Pranav advises leading funders, education initiatives and nonprofit organizations on social impact, measurement and program strategy. His current and past clients include the Bill & Melinda Gates Foundation, Education Pioneers, Cristo Rey Network, USA Funds and School Leaders Network. In addition to his consulting work, he speaks and conducts workshops on measuring social impact, national nonprofit effectiveness and education philanthropy. Pranav also serves as a guest lecturer at the Kellogg School of Management Executive Education and M.B.A. programs at Northwestern University. Prior to joining Mission Measurement, Pranav served as a program director at KnowledgeWorks, a Cincinnati-based education enterprise. Pranav is board president of the National College Access Network and is a board member of the Educational Policy Institute and Associated Colleges of Illinois. He also serves on the Chicago Advisory Board of Education Pioneers. He holds an A.B. in Economics from Washington University in St. Louis and an M.B.A. in Corporate Strategy and Organizational Behavior from the Stephen M. Ross School of Business at the University of Michigan.

ELLEN MOIR, founder and chief executive officer—New Teacher Center

www.newteachercenter.org

Ellen Moir is CEO of the New Teacher Center, a national organization dedicated to improving student learning by accelerating the effectiveness of new teachers and school leaders. She is recognized as a passionate advocate for our nation's newest teachers and for the students they teach. Ellen founded NTC in 1998 to scale high quality teacher induction services to a national audience. NTC strengthens school communities through proven mentoring and professional development programs, online learning environments, policy advocacy, and research. Today NTC has a staff of over 150 who work closely with educators and policymakers across the country. Ellen is widely recognized for her work in beginning teacher development and school reform. She has extensive experience in public education, having previously served as director of teacher education at the University of California at Santa Cruz and worked as a bilingual teacher. Ellen became an Ashoka Fellow in 2011 and is a recipient of the 2011 Skoll Award for Social Entrepreneurship. Other major awards include the 2010 Civic Ventures Purpose Prize Fellow; 2008 National Staff Development Council Contribution to the Field award; the 2008 Full Circle Fund Impact Award; the Harold W. McGraw, Jr. 2005 Prize in Education; and the 2003 California Council on Teacher Education Distinguished Teacher Educator Award.

WILLIAM PORTER, partner—Education First

www.education-first.com

Bill has served as an education adviser to CEOs, governors, grantmakers and community leaders, helping them clarify strategic choices and identify high-impact policies and leverage points. One of four partners at Education First, he has led recent projects with the AFT Innovation Fund, Bill & Melinda Gates Foundation, William and Flora Hewlett Foundation and the Southern Regional Education Board, as well as providing counsel and technical assistance to Race to the Topwinning states as they implement their bold reform plans. Previously, Bill was executive director of Grantmakers for Education—a national network of 250 foundations, companies and donors representing \$1.5 billion in annual grantmaking—where he worked to improve the effectiveness of the field of education philanthropy. He also led Partnership for Learning, a nationally recognized business advocacy organization in Washington State, and served as policy director to Colorado Governor Roy Romer. Bill volunteers on the board of directors of the Portland Schools Foundation (where he is past chair) and Social Venture Partners Portland, a giving circle. He holds a B.A. in English with Distinction from The Colorado College.