PATHWAYS TO PROGRESS:
Forging Strategies to Broaden Impact

NOVEMBER 2016

INCREASING ACCESS AND OPPORTUNITY

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About Equal Measure

Headquartered in Philadelphia, PA, Equal Measure provides evaluation and philanthropic services to social sector organizations. Our areas of focus include aligning systems for stronger outcomes, increasing access and opportunity, building human and social capital, strengthening community capacity, and elevating ideas for innovation. For more than 30 years, our clients have been major private, corporate, and community foundations, government agencies, and national and regional nonprofits. We have deep experience with network collaborative initiatives that improve educational outcomes, and build career pathways, for young adults to live better economic qualities of life. To that end, we have worked on an array of major national and regional programs for organizations such as the Citi Foundation, the Aspen Forum for Community Solutions, the James Irvine Foundation, the Lumina Foundation, the Helmsley Charitable Trust, Living Cities, StriveTogether, RISE for Boys and Men of Color, the W.K. Kellogg Foundation, and U.S. Department of Labor-funded grants in Wisconsin and the Northeast U.S.

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Introduction: *The Pathways to Progress* Investment

In 2014, the Citi Foundation launched *Pathways to Progress*, a three-year, $50 million initiative in the United States to help 100,000 low-income youth — ages 16 to 24 — develop the workplace skills and leadership experience necessary to compete in a 21st century economy.

To achieve its ambitious goal, the Foundation enacted a multi-tiered strategy primarily focused in ten cities: Boston, Chicago, Dallas, Los Angeles, Miami, New York City, Newark, St. Louis, San Francisco, and Washington, D.C. The U.S. strategy also includes complementary national and local investments, including the Boys and Girls Clubs of America, the National Academy Foundation, and the National Association for Urban Debate Leagues.

In addition to the core and complementary program investments, the Citi Foundation's multi-tiered strategy includes substantial volunteer engagement by Citi employees, and a significant communications platform — augmenting grantee organizations' efforts to share their impact with the field.

In its efforts to advance youth economic opportunity on a significant scale, the Citi Foundation has invested in solutions that offer promise of sizeable and replicable impact.

The Foundation has chosen five grantee organizations, with four different program "pathways" that reflect the latest field understanding about approaches that can have a lasting impact on a youth's economic well-being.

Figure 1. The *Pathways to Progress* Grantees

PATHS	ORGANIZATIONS	PROGRAMS	YOUTH IMPACT STRATEGY
Service/ Leadership	Points of Light	ServiceWorks	Leverages community engagement and volunteer service to help underserved young adults ("Service Scholars") develop the skills to prepare for college and careers
Summer Jobs	Cities for Financial Empowerment Fund (CFE Fund)	Summer Jobs Connect	Sets young people on the pathway to economic success through summer jobs, while providing them with targeted financial education and access to safe and affordable financial products
Entrepreneurship	Network for Teaching Entrepreneurship (NFTE)	Make Your Job	Empowers low-income youth to develop the entrepreneurial mindset and business skills to make their own job and succeed in the modern workplace
Mentorship	iMentor	iMentor	Builds mentoring relationships that empower students from low-income communities to graduate high school, succeed in college, and achieve their ambitions
	Management Leadership for Tomorrow (MLT)	MLT Ascend	Provides comprehensive guidance and support from a network of mentors, all of whom are alumni of MLT programs, and a personalized career readiness roadmap, to ensure that low-income, first generation minority college students graduate and are prepared for professional careers that lead to long-term employment and financial stability

Where the Investment Stands Today

Since its launch, *Pathways to Progress* investments have enabled the five U.S. based grantees to create new programming, augmented or altered existing program models, and substantially expanded their reach, affecting greater numbers of youth.

Three of the organizations *launched new programs* under the *Pathways to Progress* investment: Summer Jobs Connect, by the Cities for Financial Empowerment Fund; Ascend, by Management Leadership for Tomorrow; and ServiceWorks, by Points of Light. Since the start of *Pathways to Progress* in March 2014, these organizations have built partnerships with local organizations and institutions to launch these programs, and designed and refined key program features, including:

- Program curriculum;
- Processes for, and approaches to, recruiting, orienting, and engaging youth participants;
- The recruitment, training, and ongoing support of volunteers as coaches, mentors, and workshop facilitators;
- Definitions of program success and completion for participants; and
- Methods for tracking and systematically using program data to improve results.

The other two organizations supported by the *Pathways to Progress* investment, iMentor and the Network for Teaching Entrepreneurship, have augmented their existing core programming. For example, iMentor launched a new technology platform to increase engagement between its mentees and mentors. Similarly, NFTE expanded its use of technology to create greater impact, launching a new online social game site, "Make Your Job", through which student entrepreneurs can create and share business ideas and compete for prizes.

As the end of this three-year investment nears, the grantees are building upon the robust design and deep implementation knowledge they have gained – through direct replication, partnering with other organizations to deliver their programming more widely, sharing their model via toolkits, and other methods of scaling their impact.

A GLOBAL IMPACT ON YOUTH ECONOMIC OPPORTUNITY

In 2015, the Citi Foundation expanded the *Pathways to Progress* initiative to encompass its global investments in innovations focused on developing youth economic opportunities across Latin America and the Caribbean, Europe, the Middle East and Africa, and the Asia Pacific region. As part of this global expansion, the Citi Foundation released *Accelerating Pathways*, a research and field building effort examining how 35 cities around the world support young people's economic ambitions.

About this Issue Brief

The U.S. *Pathways to Progress* portfolio has three intended levels of impact:

Field: Spreading programmatic lessons and findings within the field;

Organization: Strengthening organizations' abilities to serve more youth through design and implementation improvements, and through scaling and replication; and

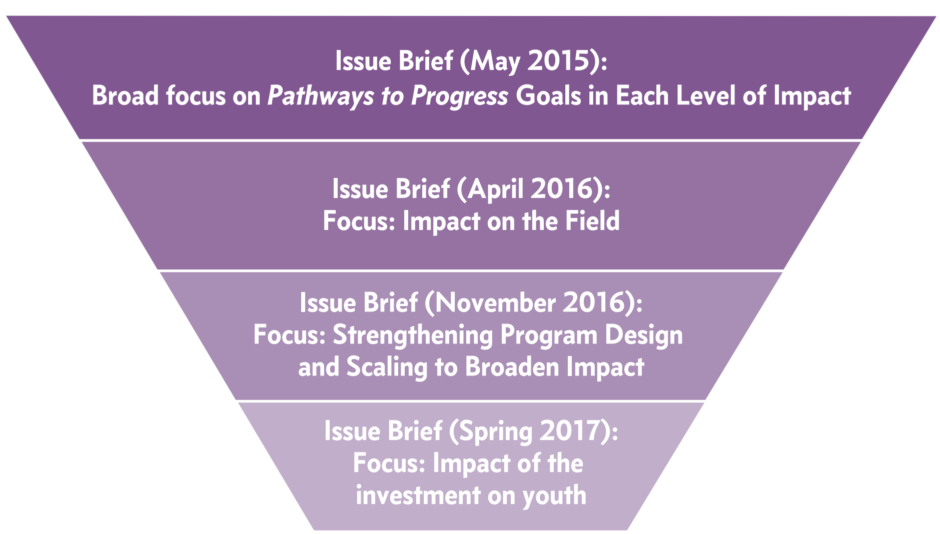
Youth: Providing pathways for youth to develop workplace skills, leadership experience, and financial empowerment behaviors.

In our inaugural Issue Brief, *Pathways to Progress: Setting the Stage for Impact* (May 2015), we described the Citi Foundation's goals in each of these impact areas and early progress toward achieving these goals. In our Issue Brief, *Pathways to Progress: The Portfolio and the Field of Youth Economic Opportunity* (April 2016), we focused on impact in the field.

We provided an overview of current trends in the youth economic opportunity field, and shared how the *Pathways to Progress* grantees are responding, and contributing, to emerging youth economic opportunity field trends. In this Issue Brief, we focus on the second level of impact – the organization and program. We describe how the grantees are scaling their program models to enhance their reach. To provide context for the grantees' work in this area, we draw from literature on the topics of scaling, local program adaptation, partnerships, and data informed programming, as well as a series of interviews we conducted with leaders of organizations that have successfully scaled their programs, and key influencers in the youth development and economic opportunity fields ("bellwethers").

Our final Issue Brief, to be released in spring 2017, will describe the results of the three-year investment, with a special focus on the investment's impact on the youth it was designed to serve.

Figure 1 ***PATHWAYS TO PROGRESS* ISSUE BRIEFS: AREAS OF FOCUS**



SECTION 1

BROADENING IMPACT: GRANTEES DEMONSTRATE MYRIAD WAYS TO SCALE

The experience of the five *Pathways to Progress* grantees demonstrates that scale is not just about expanding from site to site. Rather, the grantees are using a hybrid of approaches to spread their impact – including replicating a program in new sites, expanding to new locations via partner organizations, adding online program components, providing technical assistance and resources to new sites to implement the model, and advocating for changes in policy and practices to more broadly advance their mission.

Figure 2 depicts how the grantees are seeking to scale their impact, moving from the most direct method of expansion, "replicating a program in new sites," to what may be considered the most indirect method, with potentially broader reach, "advocating for changes in policies and practices."

Figure 2 **METHODS OF SCALING IMPACT**

REPLICATING A PROGRAM IN NEW SITES

- **iMentor**
- **NFTE**
- **CFE Fund** *(during the three-year demonstration phase)*
- **Points of Light**
- **MLT**

EXPANDING TO NEW LOCATIONS VIA PARTNER ORGANIZATIONS (e.g., Boys and Girls Clubs of America, YMCA)

- **iMentor**
- **Points of Light**

ADDING ONLINE PROGRAM COMPONENTS
(e.g., through an online course or curriculum)

- **Points of Light**
- **NFTE**
- **MLT**

PROVIDING TECHNICAL ASSISTANCE AND CREATING AN EXTERNAL LEARNING COMMUNITY TO SUPPORT IMPLEMENTATION OF THE MODEL

- **CFE Fund**

ADVOCATING FOR CHANGES IN POLICIES AND PRACTICES TO MORE BROADLY ADVANCE THEIR MISSION

- **CFE Fund**
- **NFTE**

This mix of scaling methods pursued by the *Pathways to Progress* grantees provides insights into the options an organization might pursue depending on its program model and operational capacity and infrastructure.

For example, iMentor, which has refined its program model over the past 16 years, and has tested expansion through partnerships with nonprofits across the country, is growing its operational capacity and infrastructure to support replication in two cities (Chicago and the San Francisco Bay Area), as well as continuing to expand its partnership approach and share knowledge to influence the field. At the other end of the spectrum, CFE Fund, whose mission is to embed financial empowerment strategies into municipal agencies, rather than through direct program delivery, is pursuing a more indirect approach to scaling impact. CFE Fund provides technical assistance and is creating a learning community to help municipalities implement its model, and advocates for broader policy and practice changes to integrate financial education and banking access into municipal programming.

These diverse approaches to expand impact reflect replication strategies discussed in field literature. According to *What Would it Take?* (Grantmakers for Effective Organizations), to affect more people and create greater social change, we need to consider multiple ways to grow impact, including advocating for policy change, transferring a technology or a skill, and spreading an idea or innovation, in addition to the traditional notion of program expansion.

In "Emerging Pathways to Transformative Scale," Jeffrey Bradach and Abe Grindle of Bridgespan argued that to affect greater numbers, it is important to focus on scaling impact, rather than simply expanding organizations. They proposed nine different ways to potentially achieve "transformative scale," including distribution of a program or intervention through large existing platforms (such as the national YMCA network); training other nonprofits to deliver the program; using technology to reach larger audiences; changing public systems; and altering people's attitudes, beliefs and behavior.

SECTION 2

IDENTIFYING THE CORE: GRANTEES DETERMINE ELEMENTS TO REPLICATE

When organizations scale their program, whether through direct replication, partnerships and networks, or a broader toolkit dissemination approach, they must determine:

1) What is the core of the program to replicate?

2) What can and should be customized to fit the local context?

3) What is the most effective way to communicate the core for replication?

IDENTIFY THE CORE

Develop a Theory of Change

Engage in Systematic Use of Program Data

CUSTOMIZE FOR LOCAL CONTEXTS

Adjust the Model for the Needs of Different:

Populations

Organizations and Institutions

Contexts (political, cultural, socio-economic)

COMMUNICATE THE CORE FOR REPLICATION

Identify Ways to Facilitate User Application of the Model

Identify the Core

To identify the core of their program, and to document and communicate it for expansion, grantees are developing theories of change (TOC) and undertaking a systematic approach to collecting and analyzing program data.

Develop a Theory of Change

A theory of change is an invaluable tool that organizations use to identify the core of their program model. It operates as a map, detailing the heart of the program and the components that are necessary to achieve the desired outcomes. Several *Pathways to Progress* grantees use theories of change as a guide to understand what design and implementation aspects are core to achieving outcomes, and as a tool to communicate these core components. For instance, NFTE created a concise one-page theory of change to diagram the activities necessary to achieving its desired short- and long-term outcomes. NFTE used this theory of change to frame an assessment of the higher performing NFTE classrooms, referred to as its "Blue Ribbon Classroom Study". Through this process, NFTE learned that its program was most effectively implemented in classrooms where: 1) students played a major role in leading program activities, and 2) the teachers were highly engaged in experiential learning activities for the students. As a result of this study, NFTE developed a Blue Ribbon Classroom Guide to inform program implementation across sites.

Points of Light has used its theory of change for ServiceWorks to inform training and evaluation since the beginning of the program, and has continued to use it as a guide to communicate core program components. When training local site supervisors, AmeriCorps VISTAs, and volunteers, Points of Light shares its theory of change to communicate about its interventions and the desired early, intermediate, and long-term program outcomes.

"Core components are directly related to a program's theory of change, which proposes the mechanisms by which an intervention or program works. The core components are intended to, or have been demonstrated through research to, positively impact the proximal outcomes that address the identified needs and that increase the likelihood that longer-term outcomes will be achieved. In short, the core components are the features that define an effective program."

—Assistant Secretary for Planning and Evaluation, Department of Health and Human Services, Research Brief: *Core Intervention Components: Identifying and Operationalizing What Makes Programs Work*, February 2013

The grantees' use of theories of change for design, program management, training, and evaluation reflects the perspective shared by several bellwethers and the field literature about the vital role a theory of change plays in scaling programs. Katie Barnett of the Social Innovation Forum described the role the theory of change process plays in the Social Innovator Accelerator program, which identifies and supports small to mid-sized nonprofits ready for growth. In the Accelerator program, a consultant works with the nonprofits to connect the theory of change to a graphic that simplifies the program model and forces the discussion of what is critical and what can be left out.

Similarly, Samra Haider, Executive Director and Johanna King-Vespe, Director, of the Center for Employment Opportunities National (CEO), consider the theory of change as a guide to communicate the core components of their program when they bring on new sites and hire new local site directors. CEO uses its theory of change as the basis for the systematic tracking of outcomes across 11 offices in four states.

Engage in Systematic Use of Program Data to Define Core Model Components

The *Pathways to Progress* grantees have demonstrated how systematic collection, analysis, and use of program data is an invaluable tool to inform program design and implementation, and to define the core components of the model for scale.

Over the past two years of the *Pathways to Progress* initiative, iMentor has grown its internal evaluation infrastructure and expanded its focus on real-time use of data to inform programming on the ground. In addition, iMentor is using its increased evaluation capacity to strengthen its integration of evaluation and day-to-day program operations. This in turn has enabled the organization to more nimbly use its performance assessment system to shift intervention approaches, services, and processes strategically as needed.

At the heart of iMentor's evaluation system is a set of 14 "core metrics," which it uses to define and track the implementation of its program – in particular its core model components – and to gauge progress on short- and long-term outcomes toward college completion. Within its Program Execution metric, iMentor tracks *"everything we need to do in order to run our program successfully,"* noted Jim Lauckhardt, Director, Research and Evaluation for iMentor. These activities include recruiting and retaining quality mentors, recruiting and retaining school partners, and providing high quality pair support.

Similar to iMentor, MLT is using data to inform its Ascend program design and implementation, and identify the core program elements. Based on collecting and analyzing program data, MLT adjusted a central component of its Ascend program – the training and support of volunteer coaches. After some challenges in the uptake of the coaching curriculum, MLT shifted from more of a scripted curriculum to a series of "playbooks" for the coaches, with modules in areas such as academic and career development and problem solving and relationships. To delve deeper into what comprises the most successful coaching experience, MLT studied high performing coaches, analyzing them in areas such as creativity, enthusiasm, and engagement. As MLT continues to identify the ingredients necessary to yield the best coaching experience, they are also implementing the use of paid coaches to supplement the work of alumni volunteers as the program expands.

The value of this integrated and systematic approach to using evaluation data to assess and refine program implementation was echoed by several bellwethers. Margaret Hall, National Executive Director and Co-Founder of the Green Light Fund, cited the benefits of having dynamic conversations within organizations about what the data "means on the ground." Referring to the "democratization of data," Hall emphasized that in a program that is expanding to additional sites, it is especially important for local site leaders to bring the experience of the field to national or central office evaluation discussions.

Peter Murray, President, Accelerate Change, said the type of evaluating and adjusting undertaken by MLT is just what a demonstration program should do. *"This stuff is hard. You should be trying hard things and then iterating and pivoting and saying, 'Okay, that wasn't the best model for recruiting mentors. It's this other model that we're going to try next, and let's try that.'"*

Customize for Local Contexts

While assessing progress across sites, the Pathways to Progress grantees have learned to adapt core features to fit local contexts in order to expand their reach. Through their systematic data collection and analysis, the grantees identified areas that required local adaptation to improve results, and responded by assessing how different program elements fit local contexts or the needs of different population groups.

While holding constant its core model of civic engagement and youth volunteerism, Points of Light has created different iterations of the ServiceWorks curriculum and its delivery mode to maximize potential impact on varied populations. For example, Points of Light has offered condensed "boot camp" versions of its curriculum, to shorten it for program partners and populations with less time available for the extended curriculum. In addition, the ServiceWorks curriculum lends itself to variation based on local context. The program experience for participants culminates in a capstone project focused on a relevant local topic of their choosing. These projects provide Service Scholars with the opportunity to discuss local issues with their peers, and then plan and execute a volunteer project in response to the identified community need. *"We've seen from year one data that the big thing here is flexibility,"* said Brandee Menoher, Senior Director, Evaluation and Performance Measurement, Points of Light. *"I think something that gives us the ability to scale is that we are not re-inventing the wheel, but are working with existing programs."*

The CFE Fund has focused on adapting its Summer Youth Employment Program – promoting consistency where needed to achieve the youth banking outcomes, while supporting local customization of the financial education intervention strategies – to fit local infrastructure and employment program models. As a key component of its toolkit for scaling, the CFE Fund is creating a matrix that conveys intervention strategies that may work for different local contexts, while keeping constant

> *"Experience with large-scale implementation of evidence-based interventions has forced the recognition that intervention strategies for achieving core features may vary across settings."*
>
> —*"The Importance of Contextual Fit When Implementing Evidenced-Based Interventions"*, ASPE Issue Brief, Office of the Assistant Secretary for Planning and Evaluation, Office of Human Services Policy, US Department of Health and Human Services, September 2014

the core features of promoting financial education and banking access through municipal employment programs. *"One of the things that we have realized in all of our work is that the cities are so different, and what works in one city may not work in the others,"* explained Nicky Grist, Principal, CFE Fund. *"We are going to classify in a grid the cities by how they run their program, so that other cities can come in and say 'I can see how this other program like mine is doing this.'"*

The local customization exemplified by Points of Light and the CFE Fund aligns with strategies suggested by bellwether interviewees. As Laura Keane, Chief Policy Officer, UAspire, noted: *"While it is important to hold true to 'the center' of what the organization is about, as long as a site or partner is programming toward the outcome, it is important to allow for some innovation in strategy to better meet the outcomes in a particular context."*

Communicate the Core for Replication

In concert with identifying core program model components to scale, and determining how to adapt those components to local contexts, the Pathways to Progress grantees are addressing how to best communicate the model to organizations that may implement it in whole or in part.

When identifying the appropriate means of communications, the grantees are focusing on aspects of the model's core components that will facilitate use by local site staff, partner organizations, or other stakeholders.

NFTE is using a mix of methods to convey information about its core model as it pursues a focused scaling strategy. NFTE's scaling strategy includes taking its current high-quality but stand-alone programs and integrating them into a progressive learning series – using a blended learning model to be more responsive to the career readiness outcomes that schools are increasingly accountable to produce.

One way NFTE has communicated information to school sites seeking to adopt NFTE or expand the program is through its Blue Ribbon Classroom Guide, which showcases the practices that help make the NFTE model effective, drawing on the research conducted about effective NFTE classrooms in its Blue Ribbon Classroom Study. By emphasizing practices that work, the classroom guide takes a user-focused approach to spreading knowledge about the core components of the NFTE model. NFTE has also built a strong collaborative peer network across field offices, through which sites share implementation strategies.

Executing a successful communications approach takes an investment in resources and mechanisms to transmit the information, and to provide the appropriate supports, said Dan Cardinali, President and CEO, Independent Sector. Similarly, Sarah Gordon, Vice President, Center for Financial Services Innovation, emphasized the need to counsel potential sites on how to adopt the program model. *"Make sure that there's a clearly laid out process for how other groups can implement it as easily as possible,"* she said.

> *"There is a set of support structures like ongoing coaching and professional development that allow this work to take root in new communities."*
>
> —Dan Cardinali, President and CEO, Independent Sector

BUILDING PARTNERSHIPS TO SPREAD IMPACT

As organizations consider scaling their programs, they may develop partnerships for a number of reasons, including:

- To more effectively roll-out or increase program delivery and implementation
- To expand recruitment efforts and gain access to a broader array of students
- To provide complementary services or merging of expertise
- To broaden a volunteer/mentor or funding base
- To ensure contextually appropriate programming at local sites

Partners can greatly aid scaling under any of these scenarios. In some cases, it may be more efficient and expedient to replicate a program model in new locations using a partner's infrastructure, capacity, and client base to spread the program model rather than open a new physical location from scratch. In other cases, a partner can serve as a conduit to a different or larger client population to expand a program's reach. Or a partner may provide ready access to volunteers, as in the case of the Citi Foundation, providing connections to corporate volunteers for all five of the *Pathways to Progress* grantees. With any of the aforementioned reasons for partnership, organizations should reflect upon the following core questions, which reflect best practices in partnership development:

- Is there a clear understanding of how the initiative will be scaled to help determine the types of partners that can be most beneficial?
- Is there alignment of the mission, objectives, and the process for achieving outcomes across the partnership?
- Is there an explicit understanding of the roles and contributions expected from each partner, providing clarity on their respective institutional/organizational capacities; accounting for any redundancies in offerings/services, or gaps identified among the partners?
- Is there a shared understanding about how data will be collected, analyzed, and used to inform decision-making throughout the partnership/partnership-related activities?
- Is there institutional/organizational buy-in for participation in the partnership at all levels, from on-the-ground service delivery to executive-level leadership?
- When working with local partners, has an effort been made to develop familiarity with local site characteristics, considering ways to customize the model to maximize impact?
- Have connections with key influencers/stakeholders in the community been fostered?
- Are all partners invested in the shared effort? Does everyone feel they are connected and "a part of the program?"

Asking these questions routinely throughout an initiative can help organizations determine the strength of their partnerships, and offer potential ways to improve the relationships, if necessary.

CONCLUSION

INVESTING IN CAPACITY AND INFRASTRUCTURE TO SUPPORT SCALING

As organizations scale their programs, they should consider several significant operational capacity and infrastructure issues:

1) Leadership, management, and staffing capacities to plan and guide growth

2) Infrastructure to support training, technical assistance, and evaluation

3) Resources and revenue to support and sustain growth

1

Leadership, Management, and Staffing Capacities to Plan and Guide Growth

As organizations aim to expand their reach, whether through geographic replication or other means of leveraging impact, strong leadership and the capacity to staff the programs is essential. Several bellwethers echoed what is commonly cited in case studies and profiles of nonprofit organizations that successfully grow and yield influence – strong leadership, both at the top as well as across levels of management, and local site leadership, are critical to successful and sustainable growth. This leadership must embody a combination of strengths, including planning and management skills, fundraising, and experience in community engagement and collaboration.

When it comes to staffing, a common thread among the *Pathways to Progress* grantees is the use of volunteers to enhance service capacity. All five grantees use volunteers as a substantial component of their model, as mentors, coaches, and teachers. Although the grantees' use of volunteers may ease scaling in part, because of the additional capacity, it also requires recruiting, onboarding, training, and continued support.

Recognizing that its volunteer coaches are a critical ingredient of Ascend's success, MLT has improved its coach orientation, training, and professional development programs, adjusting them to reflect the experiences of coaches in the first year of the program. MLT now offers more flexible access to different curriculum modules and resources to fit the independent needs of the mentee-coach pairs. iMentor has created support documents for its volunteers, clarifying roles and expectations for mentors and volunteers and providing resources.

> *"What is most important in a scaling effort is building an organization that hires and supports strong local leaders, essentially getting leaders in place from the beginning in a new site that have fundraising skills and capacity and responsibilities, versus putting a program person in place because there's some up-front funding."*
>
> —Margaret Hall, National Executive Director and Co-Founder, the Green Light Fund

Infrastructure to Support Training, Technical Assistance, and Evaluation

In tandem with leadership and staffing is the need for a more advanced infrastructure to support the training of staff and volunteers, provide technical assistance to local sites and/or partners, and evaluate program service delivery and outcomes. Bellwethers emphasized that nonprofit organizations should invest in training and technical assistance with local sites and/or partners, and build a performance management system as a planning, management, and communication tool. Lois Nembhard, Deputy Director, Social Innovation Fund, spoke of the value of creating a manual that documents how to evaluate the implementation of the program model across sites: *"How you determine what participation looks like, the length of time, the number of visits, what you're tracking for each individual that you're serving, what kind of information you're looking for, and that folks are talking about it and documenting it in the same way, ends up being really critical. When you have a manual, and you're finding ways to ensure that people are following it, then you're in a much, much better position."*

As mentioned earlier, NFTE has developed manuals or playbooks for local sites as part of its larger effort to strengthen its cross-site infrastructure over the course of the Citi Foundation investment. Along with its playbooks for local sites, NFTE has refined its staffing structure within local sites, added staff capacity, and increased efforts to facilitate and support cross-site collaboration.

An increasingly valuable way to strengthen infrastructure is the use of technology. *Pathways to Progress* grantees are using technology to support scaling in several ways: to reach students who cannot attend programming in person; to engage students with different curriculum elements; to improve staff and site internal communications, as well as to communicate with and support mentors; and to facilitate collecting and using data to inform programming systematically across sites. For example, Points of Light has developed online versions of its ServiceWorks curriculum, offering a much greater degree of flexibility to reach students who cannot attend sessions in person. iMentor has integrated technology in several ways, including: creating platforms called Canvas, Portfolio, and Conversation, which automate and support multiple mentor-mentee exchanges; and designing Joey, a system of intelligent automation, to keep track of appointments and scheduling between mentor-mentee pairs.

> *"Your program participants are not just the scholars, but they are the coaches, too. You have to recruit, train, and get survey data from them. When we talk about program participant numbers, we have 270 scholars, but really we have 500 participants because we have to include the coaches, too."*
>
> —Theresa Atta, Director, MLT Ascend

Resources and Revenue to Support and Sustain Growth

Lastly, and equally as critically, organizations considering any strategy to broaden their reach must consider how to support their efforts financially. Bellwether Greg Baldwin, President of VolunteerMatch, stressed that nonprofit organizations must devise a sustainable financial model for their programs at the outset of the initiative, and that this model should be composed of a diverse mix of strategies – e.g., earned revenue (e.g., fee-for-service), philanthropic funding, donations from high net-worth individuals, crowdsourcing, and, if applicable, government grants. *"Money and mission must be clearly aligned, and nonprofits should become more enterprising in how they think about financial sustainability,"* he said. The imperative to design a multi-layered financial sustainability plan is supported by the fact that only 16% of nonprofit sector revenue comes from foundations (Giving USA, 2015).

These leadership and staffing, infrastructure, and financial considerations are vital aspects of nonprofit health at any point in an organization's life-cycle. However, they are especially critical to pay attention to as organizations consider options for scaling. While identifying the core of a program model, and determining how to customize it for local sites are essential steps to replicate a program model, without the financial, staff, leadership, and infrastructure components to support the model's implementation, expansion cannot succeed.

"We are defining our local and national operations and how we staff accordingly as we go to more locations. How do we make sure we have a financially and operationally viable organization that can implement our work and go to scale?"

—Jim Lauckhardt, Director of Research and Evaluation, iMentor

Pathways to Progress Bellwether Interviewees Spring 2016

Amy Arbreton
Evaluation Officer, The William and Flora Hewlett Foundation

Greg Baldwin
President, VolunteerMatch

Katie Barnett
Associate Director, Social Innovation Forum

Kevin Bolduc
Vice President of Assessment Tools, Center for Effective Philanthropy

Daniel Cardinali*
President and CEO, Independent Sector

Sarah Gordon
Vice President, Center for Financial Services Innovation

Samra Haider
Executive Director, Center for Employment Opportunities National

Margaret Hall
National Executive Director and Co-Founder, Green Light Foundation

Laura Keane
Chief Policy Officer, uAspire

Johanna King-Vespe
Director, Center for Employment Opportunities National

Peter Murray
President, Accelerate Change

Lois Nembhard
Deputy Director, Social Innovation Fund

Karen Pittman
Co-Founder, President and CEO, Forum for Youth Investment

James Siegel
CEO, KaBOOM!

**Daniel Cardinali spoke to us as a bellwether in his former role as President, Communities in Schools*