

Making Results Count

Influencing Organizations to Achieve
Population Results Through the Casey
Children and Family Fellowship



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Executive Summary

The ability to realize better futures for children and families, with an emphasis on achieving more equitable outcomes, requires strong leaders. Leaders must both develop their personal leadership skills and embed a results focus throughout their organizations. To accelerate the adoption of a results focus and contribute to positive results for children and families, the Annie E. Casey Foundation (Casey) began the Children and Family Fellowship® program (the Fellowship) in 1993. The Fellowship is an intensive 21-month executive leadership program that empowers leaders from nonprofit, philanthropic, and public organizations to mobilize change initiatives that improve the life circumstances and prospects of children and families. Casey supports program participants (Fellows) as they refine their skills and help their organizations and partners adopt work practices that both improve results for all while addressing factors that contribute to inequities.

Between 2016 and 2019, ICF partnered with Casey to evaluate the Fellowship program. ICF's leadership development and evaluation experts designed and performed a longitudinal evaluation, going beyond self-report data to include assessments from multiple perspectives – Fellows, their colleagues, their external partners and Fellowship program faculty. ICF also observed Fellowship seminars and observed Fellows working in their home organizations. Further, our three-year research design permitted us to examine how results-focused approaches became part of how work was accomplished by Fellows' organizations and their partners after the end of the program.

Evaluation results highlighted how Fellows and their organizations incrementally adopted a results focus, and how organizations eventually embedded data-driven methods into routine work practices (e.g., using disaggregated data, fostering accountability throughout the organization and with partners). We present key evaluation findings below.

Creating an Equitable Results Focus

Evaluation results indicated that as leaders grew in their mastery of results-focused approaches, they began to spread those approaches to colleagues and critical teams across their organizations. Leaders started this process by embodying the Results Count® competencies¹ and modeling daily work practices that focused on results. Leaders motivated other top leaders and key teams to adopt a results-focused culture by first identifying a population-level result to which the organization could contribute and then using data to



¹ See the Glossary of Terms for a full description of Results Count competencies.

illuminate what it would take to make that contribution. The following powerful actions assisted organizations along their adoption journey:

- Integrating a results focus into structured work practices, either by leaders using practices personally or within teams (i.e., executive leadership teams, program teams).
- Refining performance measures (PMs) and population indicators (PIs) such that metrics successfully measure intermediate outcomes and consider how to go beyond measuring *how many* children and/or families receive services to measure *how effective* the services are for children and families – and in particular, what effects occur for disproportionately affected populations of interest.
- Analyzing data to discover what the leaders' organizations might be missing or how organizations might adjust efforts to better serve the people they care about.
- Holding one another accountable for changes (both inside the organization and with external partners) and persistently working alongside partners to make equitable impacts.
- Providing training and development opportunities for leaders and staff, including informal instruction and/or peer coaching to help each other deepen a results focus.

The process of first focusing on desired results for target populations caused most organizations to adjust their work practices to incorporate multiple disciplines, work across organizational and departmental boundaries, and involve the community in solutions.

Addressing Individual Development in Service of Organizational Change

Casey views individual leader development as a mechanism to create lasting organizational change. Evaluation results indicated that, by applying tools and approaches shared during Fellowship seminars to organizational strategies and programmatic activities, leaders' personal development incrementally transformed how their organizations carried out their work. Evaluation results identified several key elements that supported leaders to serve as the conduit for organizations to adopt a results focus:

- The Fellowship's experiential learning cycles promoted experimentation and helped leaders immediately apply results-focused skills and tools to their organizations' practices.
- Moving from a results-focused organization to one that consistently addressed equity compelled organizations to address specific nuances. While Fellowship participants acknowledged that equity is deeply embedded in the Results Count approach, they found it necessary to take intentional actions to address race equity and inclusion (REI) by prioritizing diversity and equity within their organizations, facilitating explicit conversations, and using data analyses to effectively address race equity and inclusion gaps. Leaders also spearheaded formalized practices that institutionalized an emphasis on equity, including refinements to recruitment and selection practices and in some cases adding an executive team role focused on equity.
- Fellowship participants who received sustained support from their supervisors and/or program sponsors were more readily able to accelerate and sustain changes.
- Persistent coaching and modeling proved to be effective mechanisms for creating desired behavior change in individual leaders, in their staff, and with partner organizations.

Leaders received customized support to apply and internalize Results Count approaches, thereby cultivating organizational changes that deepened a results focus, included an equity focus, and extended those approaches to partner organizations.

Changing Culture and Work Practices to Generate Big Results

Evaluation data indicated that changing the “way organizations behave daily” to include a results focus propelled leaders’ efforts to achieve desired improvements for children and families. Several actions, when pursued with commitment and perseverance, helped teams, organizations, and partners generate big results.



- With support from Fellowship faculty, leaders took personal actions to address the natural resistance to change. Successful leaders integrated results into routine job performance across disciplines (e.g., service delivery, stakeholder collaboration, internal operations). When leaders were able to show colleagues and partners that using a results focus did not serve as an additional task but rather a mechanism to obtain coordinated results for children and families, resistance gave way to acceptance and, in some cases, advocacy for a results focus.
- Leaders used their increased self-awareness obtained through the Fellowship to adjust leadership behaviors across situations and employ results-based facilitation skills. Learning how to identify adaptive challenges (i.e., non-technical barriers) with addressing necessary shifts in mental models and behaviors, through enactment of the Adaptive Leadership and Self as Instrument of Change Results Count competencies, effectively addressed resistance.
- Effectively collaborating with external partners and stakeholders required frank discussions about various parties’ motivations, constraints, and interpretations of data – thereby cultivating momentum around measurable results.

Embedding Results Count Across an Organization

ICF’s evaluation results demonstrated how capable leaders can make lasting impacts when a results focus becomes embedded in organizational strategies and work practices. Leaders’ modeling of results-focused approaches and their effective facilitation of events (i.e., with internal program teams and multiple external stakeholders) fostered detailed examination of progress and outcome data. Further, such actions inspired the inspection of disaggregated data to isolate disparate effects, fostered organizations’ emphasis on equitable results, and sustained an equitable focus in the face of policy and environmental trends that could threaten the well-being of children and families.

Introduction

The mission of the Annie E. Casey Foundation (Casey) is to create a brighter future for children, families, and communities in the United States. Casey positively contributes to the lives of children by strengthening families, building communities, and facilitating access to experiences known to improve the well-being of children and families. To accelerate Casey's ability to achieve its mission, Casey instituted the Children and Family Fellowship® program (the Fellowship) in 1993. The Fellowship is an intensive 21-month executive leadership program that develops leaders from nonprofit, philanthropic, and public organizations to strengthen their organization's capacity to improve outcomes for children and their families. For over 25 years, the Fellowship has aimed to empower diverse and visionary leaders (called Fellows) and provide them with the skills to lead change initiatives that will improve the life circumstances and prospects of children and families. As Fellows refine their skills, Casey encourages Fellows' organizations to adopt work practices that both improve results for all while addressing factors that contribute to inequities and block access to opportunities. When designing, delivering, and monitoring initiatives with children and families, Casey supports Fellows' organizations to acknowledge systemic factors that perpetuate inequitable results and build activities to foster the resources that target populations need to be successful.



Selection for the Fellowship is highly competitive, with approximately 250 applicants per Fellowship class. Sixteen leaders from varied professional backgrounds, geographic regions, and racial and ethnic groups comprise each class. While balancing the demands of their current positions, leaders participate in a series of leadership development opportunities, including four-day executive seminars, peer consultations, and individual coaching to refine competencies and skills that together comprise Casey's Results Count approach. To build leaders' capacity to achieve measurable results, each leader identifies a measurable change that he or she plans to achieve by the end of the Fellowship program. This work – the Results Action Plan – takes place primarily "back home" between seminars and is reported on and refined during the seminars. Leaders receive customized support from program faculty and other leaders as they work with their home communities. After the end of the core program, participants remain part of the Fellowship Network, an alumni group that convenes regularly to reinforce skills and exchange support.

Between 2016 and 2019, Casey partnered with ICF to design and conduct a longitudinal evaluation of the Fellowship program. The evaluation sought to document the extent to which the Fellowship program provided value to participant leaders and brought about

desired changes in leaders' organizations, as well as to collect data that inform continuous improvement of the Fellowship program.² The evaluation research design permitted ICF and Casey to study both leaders' experiences during the core program and long-term effects of Fellowship participation (i.e., up to 60 months post-program) on organizational work practices and results for target populations. All leaders who participated in the Fellowship between 2013 and 2017 were invited to participate in the evaluation. ICF used individual telephone interviews, on-site observational visits, 360-degree style surveys (to collect data from leaders' colleagues and external partners), and expert reviews of organizational artifacts and communications. ICF measured leaders' adoption of Results Count competencies and skills, how leaders applied tools provided by the Fellowship to work performed by their organizations, and how their organizations collaborated with key partners. We examined the extent to which leaders and their organizations successfully contributed to desired changes for children and families as outlined by their Results Action Plans. ICF shared evaluation results with Fellowship staff and faculty as well as Fellowship alumni to foster incremental, data-driven program enhancements.

In this report, we summarize results from our Fellowship program evaluation. We do not focus on what individual leaders personally obtained from the program, but instead on how leaders and their organizations refined work practices to focus on measurable results for children and families. While individual leader development is important, making changes at the system level for children and families in a truly equitable manner requires organizations (and networks of partner organizations) to take practices to scale and sustain practices in the face of difficulties. Thus, we view the individual development of each leader as a precursor to their organizations more effectively achieving desired population-level results.

"I really thought we should all be doing our best here for these kids. I functioned that way . . . I expect everybody else to be doing that . . . but not everyone is doing that . . . [The program] gave me the tools to still get powerful work done, even if the world isn't the way I'd like it to be."

— Casey Fellow

² Due to differences in Fellows' roles, work environments, and missions, it was difficult to compare Fellows to one another. Attributing changes or effects only to the Fellowship program itself was not feasible given numerous confounding factors in Fellows' organizations as well as societal and economic forces. Due to the small sample size during some data collection observation periods (the median number of Fellows who participated in interview data collection ranged from 9 to 13), evaluation data for certain topics is not robust enough to draw solid conclusions.

Creating an Equitable Results Focus

The Fellowship’s premise is that accelerating positive results for all children and families requires leaders and their organizations to adopt a results-driven approach to their work. It requires organizations to first identify a desired population-level result to which it can contribute and then use a data-driven approach to better understand what it will take to make that contribution. Leaders guide their organizations to use disaggregated data to better understand the factors affecting the current state and to identify what children and families in target communities need to be successful. Over time, these data inform the delivery of services and guide program adjustments that may include modifying which populations the organization serves, the skills required of staff, and the application of Fellowship tools. In this environment, leaders prioritize the use of data and activate partners to do the same to achieve desired results. Leaders use such evidence to guide program adjustments, yielding greater impacts for the people served.³



How Leaders’ Organizations Move Toward Adopting a Results Culture

As part of the program evaluation, ICF examined the extent to which each leader’s organization was receptive to using Results Count methods and tools shared during the Fellowship. Evaluation data demonstrated that at the start of the program, many Fellows and their organizations had not identified a population-level result as their target. Throughout the program, leaders identified their target and incrementally guided their organizations to use data-driven strategies to contribute to the population-level result. Evaluation results illustrated the mechanisms leaders and their organizations used to make the shift to a “results” culture, where data informed decision-making, and validated how effectively their strategies contributed to desired results.

Increasing Data-Based Practices and Data Transparency

Two aspects helped organizations integrate data-driven practices and promote data transparency. First, organizations incorporated a results focus into structured work practices. Evaluation data demonstrated how, throughout the Fellowship program, leaders were exposed to a variety of tools designed to advance their efforts to include results-driven approaches in routine work practices. Leaders integrated these tools and approaches into their organizations’ formal practices, either by using them personally or within teams (i.e., executive leadership teams, program teams).

³ Source: The Road to Better Results: Targeting Capacity Building and Philanthropic Partnerships. (2012). The Annie E. Casey Foundation.

During observations conducted by ICF evaluation experts, we saw how such practices guided staff to disaggregate trend data to identify where disparities existed. Additionally, we observed how organizations used results to ensure that strategies and programmatic activities addressed the root causes of disparities. Over time, leaders and staff members increasingly focused on ensuring that their efforts both improved results for the population of interest and closed equity gaps for subpopulations. Additionally, evaluation results showed how formalized work practices reinforced the value of data for continuous refinements.

Evaluation Evidence



Integrating a results focus into structured work practices

Relevant Results Count Tools:

Action Commitments

Data tools (e.g., data walks, root cause analysis)

3R Agenda

- Leaders provided formal Results Count training sessions to other executive leaders and/or staff. Such developmental opportunities were conducted by the Fellow, a partner, and/or external consultants. Certain leaders and staff members emerged as Results Count practitioners and helped spread results-focused activities to other leaders and staff.
- Leaders modeled the use of Action Commitments⁴ at both the leadership and front-line levels, which helped individual contributors identify desired results and publicly declare actions they were committed to taking. Use of Action Commitments also required establishing performance measures and population indicators. All actions and investments were tied to Results Action Plans, which formalize action planning processes to keep results in the center.

"[Action Commitments] have been a good way to keep track of what I need to do and remain accountable to actions I need to take. They are also a way to be specific about what actions are needed in service to results so as not to spend time on things that are less relevant or off task." – Fellow⁵

- Many leaders implemented data walks⁶ as routine activities, where program data were visibly displayed and actively used in progress review events. Data walks helped reinforce the importance of disaggregating data to analyze disparate impacts and encourage transparency during dialog about organizational strategies and programmatic activities.
- Nearly every leader used agendas that highlighted the Relationships and Resources that were needed to achieve the meeting Results (known as the 3R Agenda). This type of agenda helped leaders articulate results for each component of a meeting and conduct the meeting in a manner that emphasized achieving results. Leaders used 3R Agendas in program team meetings, stakeholder outreach events, executive leadership team meetings, and other multi-partner initiative progress meetings.
- When leaders and staff used performance measures to measure the extent to which strategies were successful, the organization deepened and formalized a results focus. Since organizations reward those things viewed as vital to achieving the mission, including performance measures when evaluating the success of a leader or staff member further demonstrated the centrality of results to the organization.

⁴ Action Commitments are a structured way to create ownership for next steps at the conclusion of a meeting or event, and at the next gathering check completion of prior commitments as well as identify new commitments. See the Glossary of Terms for a full description.

⁵ Data collected during the Fellowship program.

⁶ See the Glossary of Terms for a full description.

Incorporating Data-Driven Techniques Into Work Practices Requires Perseverance

Leaders experienced some trouble integrating results-focused tools into formal work practices. Leaders assessed that some Results Count tools introduced in the Fellowship were covered at an overview level and did not address the different roles Fellowship participants adopted while leading their organizations. Leaders sought out support from Fellowship program faculty or other participants to modify tools, thus facilitating incremental adoption.

Using Measures as a Feedback Loop to Inform Organizational Strategies and Programmatic Activities

Organizations' ability to integrate data-based practices and promote data transparency was also facilitated by the use of measures as a feedback loop. This feedback loop educated staff about how organizational strategies and programmatic activities contributed to child and family outcomes. Leaders guided their staff to refine performance measures (PMs) and population indicators (PIs) such that metrics successfully measure intermediate outcomes as well as the contributions Fellows' organizations make to children and families. Additionally, leaders inspired other contributors at all levels to clearly articulate how analyzing data was an opportunity to discover what the organization might be missing or how the organization might adjust efforts to better serve the people they care about.

Evaluation Evidence



Optimizing performance measures (PMs) and population indicators (PIs)

Relevant Results Count Tools:

Results Action Plans

- Early in the Fellowship, leaders created Results Action Plans and personally championed specific PMs and PIs as a result of their participation in the Fellowship. Later in the program, leaders' organizations articulated metrics that staff were required to monitor both at the program and population levels. After the Fellowship, leaders reported championing additional metrics or disaggregating data in new ways.⁷
- Two years after participating in the Fellowship, several leaders reported that Casey's tools helped not only their own organizations but also their partner organizations to consider how they can go beyond measuring how many children and/or families receive services. Participation in the Fellowship helped these organizations measure how effective the services are for children and families – in particular, effectiveness for disproportionately affected populations of interest.
- Leaders championed the use of PMs, helping colleagues think through how to identify and use PMs and PIs – including setting expectations around PMs and their interpretation. Vital to this approach was consistent communication that not meeting targets is not failure and no one need fear reprisal. Leaders reinforced how data no longer was a means to judge "poor performance" or a "failing program," but instead to inform program refinements.

⁷ Data collected during and after the Class 10 Fellowship program.

Holding Each Other Accountable for Change

Organizations integrated data-based practices more readily when they held one another accountable for changes (both inside the organization and with external partners) and persistently worked alongside partners to make equitable impacts. Leaders of organizations that successfully shifted to a results-focused way of doing business held all parties accountable for maintaining that results focus and persevered in the face of difficult challenges.

Evaluation Evidence



Holding one another accountable for changes

Relevant Results Count Tools:

Step-by-Step Accountability Guidance

Stakeholder Analysis

Action Commitments

Results Action Plans

- Many leaders modified tools provided during the Fellowship to create step-by-step guidance for internal groups to create and maintain data processes and outcome tracking. Team members specified metrics to capture the extent to which strategies were accomplishing racial equity goals, used data to improve their programs and practices, and held each other mutually accountable to desired results. This step-by-step guidance helped all contributors assess the actual impact and unintended impacts (positive or negative) of program efforts.

"My team has been struggling with accountability, and the tools were used to frame and move the conversation forward in a way where there has been great traction and a clear improvement in our team accountability." – Fellow⁸

- Leaders conducted a Stakeholder Analysis at the start of an initiative and revised it throughout. Leaders worked with colleagues and partners to be frank about each stakeholder's needs and restrictions, then built those factors into Results Action Plans and Action Commitments. When working with partners, leaders used a neutral consultant stance to gently recognize adaptive challenges and helped partners move through loss as they modified efforts.
- Participation in the Fellowship program caused leaders to be intentional about "giving the work back" (i.e., inspiring colleagues to engage in stretch assignments and experiment with leadership roles). Faculty coaching helped leaders focus on hitting targets and pushing their teams to hold each other accountable to the results.

"I . . . use the tool with partners to identify factor analysis and strategies around our work. It has given me a specific template that can be used in many ways and used as a road map to achieve change." – Fellow

⁸ Data collected during the program.

Additionally, leaders persistently worked alongside partners to make equitable impacts, often in the face of difficult challenges.

Evaluation Evidence



Persistently working alongside external partners to make equitable impacts

Relevant Results Count Tools:

Collaboration with Results Partners

Collaborative Leadership Competency

Results-Based Facilitation

Results Action Plans

- The Fellowship program afforded leaders a supportive place to experiment with partnering strategies that confronted existing power dynamics. As part of the program, each leader selected a Results Partner (someone either within their organization or an influential external partner) who played an instrumental role in contributing to the desired results. This partner participated in two in-person program seminars and played a significant role in the Fellows' Results Action Plans.⁹
- Leaders' development of certain collaborative leadership behaviors (as defined by the Collaborative Leadership Results Count[®] competency) and effective use of those behaviors with partners and stakeholders was instrumental to their ability to achieve results. For example, leaders displayed behaviors such as sharing decision-making and using their authority to move groups forward toward achieving results.
- Leaders applied Results-Based Facilitation techniques to design and convene structured meetings with stakeholders that emphasized conversations in contrast to one-way information sharing. Effective facilitation strategies also used data walks and other formats to keep results at the center and helped Fellows' home organizations understand partners' philosophy and limitations.
- Leaders reported that their Results Partners had the same goals as they did, helped them complete the actual work, provided financial backing for the work, and provided strategic support to advance success. Without the support from Results Partners, in many cases leaders would not have experienced success, had the funding and resources to implement initiatives, or been able to contribute to closing equity gaps for subpopulations of interest.

Sustaining Results Count Work With Partners Requires Tenacity

Leaders experienced challenges associated with an "us vs. them" mentality among some stakeholders, difficulty changing stakeholder perceptions and getting buy-in, and often struggled to become accustomed to continuously revisiting decisions and plans based on what the data revealed. Leaders employed techniques to mitigate problems by using data to back up decision-making, receiving coaching, having communication with relevant communities – and in so doing, stepping into difficult conversations with transparency and keeping child and family well-being in the center of those conversations. Leaders also developed relationships with partners sooner and used guidelines to form shared performance measures as close to the start of the initiative as possible.

Several leaders' organizations that made this shift provided formal training and development sessions for leaders and staff. In other leaders' organizations, informal instruction and/or peer coaching helped each other deepen a results focus. These experiences reinforced results-focused methods and norms at all levels of the organization.

⁹ Results Action Plans are portfolios that integrate and support Fellows' work in contributing to making a measurable difference.

What Does It Look Like When a Leader's Organization Adopts a Results Culture?

What does it look like when an organization adopts an equitable result-driven framework as a way of functioning? Most leaders' organizations that incorporated a results focus embraced a multidisciplinary approach to serving children and families. The process of first focusing on desired results for target populations caused most organizations to adjust their work practices to incorporate multiple disciplines, collaborating across organizational and departmental boundaries and significantly involving the community. One leader working in the child welfare system implemented a multidisciplinary approach that views the child in context. The approach included a community volunteer, an attorney, and a social worker. Volunteers paired with children in the system from the same community and with a similar background, religion, race, and ethnicity. The leader determined that for children in the child welfare system, having community relationships are critical and having an advocate who looks like and understands them helped create desired behavior change more readily than without such an advocate. To make a positive impact on children's well-being, credible messengers helped children know that someone who understands them is helping them overcome their challenges. Other leaders also moved to multidisciplinary approaches, which caused them to work internally across departmental or unit boundaries, as well as collaboratively with external stakeholders and partners.

Upgrading to an Equitable Results Culture

When an organization adopts an equitable results-driven focus, it is common for the organization to notice that the skills and demographics of its workforce may not be appropriate to achieve desired target population results. Several leaders' employee recruitment and selection practices evolved to better mirror the populations they serve. Under leaders' guidance, two county organizations revised several position descriptions to include results-focused responsibilities and qualifications, and adjusted recruiting strategies to attract desired candidates.

Additionally, while becoming results focused requires adjustments to organizational strategies and program practices, adopting *equitable* results-focused practices requires organizations to address specific nuances. Evaluation results demonstrated how changes in leadership practices positively influenced organizations' race equity and inclusion (REI) by prioritizing diversity and equity, increasing awareness and explicit conversations, and using data analyses to effectively address race equity and inclusion gaps. As one leader described, "REI is deeply embedded in the results-based leadership framework. All staff in training are hearing it, we are definitely talking about it more, hoping to embed it within the language of the organization . . . [we are] talking about implicit bias and ladders of inference in relation to how we interact with clients and also with each other."¹⁰ Leaders' experiences in the Fellowship program helped them bring race and equity into the forefront. As one leader remarked:

"I think it was because our population is mostly people of color that we have an equity agenda. I think we've gotten more focused about it on how we use the data, look at the data. We've really started to move into the policy disruption area, which we did very little of previously, so how can we use what we've learned and what we know our families are struggling with that disrupts systems that [are] keeping them there?"¹¹

¹⁰ Data collected upon the conclusion of the program

¹¹ Data collected after the conclusion of the program

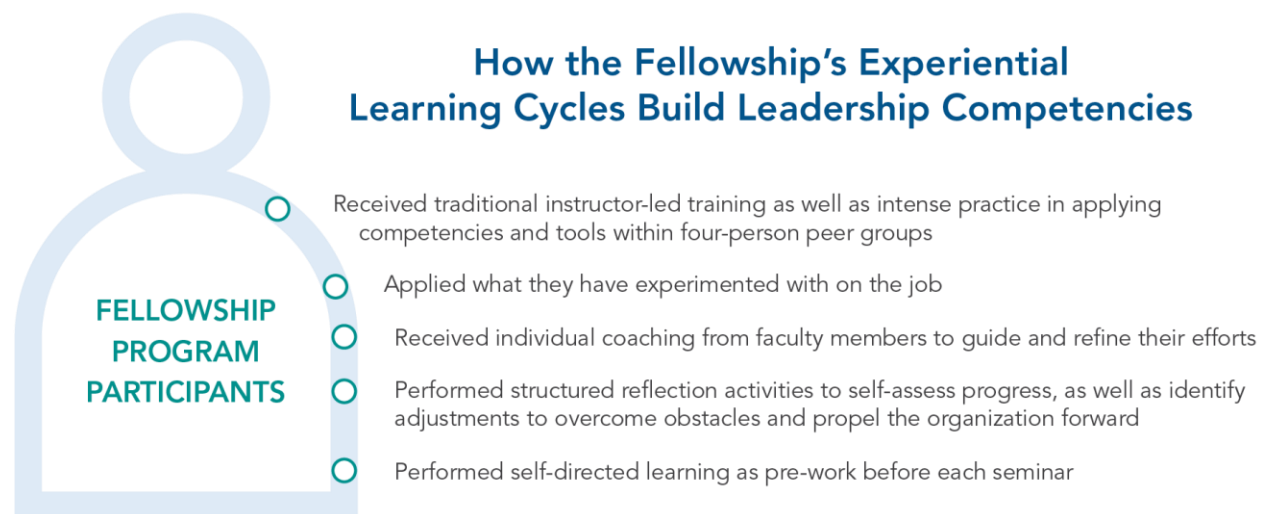
Addressing Individual Development in Service of Organizational Change

ICF's evaluation team found the Fellowship program to be a unique leadership development experience for one main reason. While most leadership development programs focus on the individual leader, the Fellowship addressed individual development specifically *in service of* organizational change to achieve population-level results. Most of the program emphasized key components of a results focus and how leaders could guide organizations to embed that focus into daily work. As leaders applied and internalized one key Results Count competency, called Self as Instrument of Change, evaluation results demonstrated how leaders used their understanding of how they impact others to build others' capacity to achieve results.

Experiential Learning Cycles Promote Immediate Application to Home Organizations

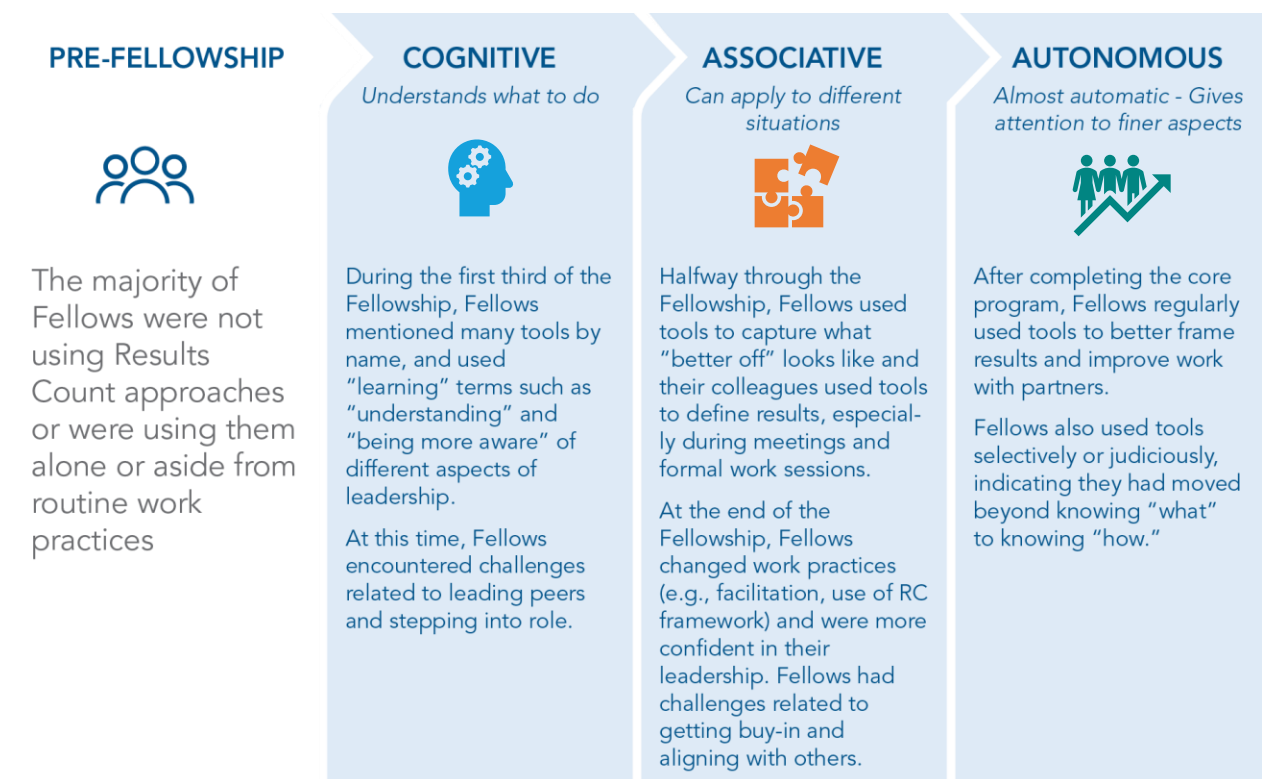
The Fellowship program used experiential learning cycles to maximize learning, thereby facilitating application of skills and tools to participants' organizations. Each Experiential Learning Cycle began with capturing the interest and engaging the leader in the topic. Next, the leader explored the topic and constructed knowledge through facilitated questioning, experimentation, and observation of effects. Then the leader experimented with applying learning to their home organization and returned to the learning environment to reflect on what occurred and decide on future refinements. Figure 1 below describes how the Fellowship's experiential learning cycles developed leadership competencies.

Figure 1. The Fellowship's Experiential Learning Cycles



Experiential learning cycles also benefited leaders by equipping them to both spread results-focused skills and tools across their organization and inspire partner organizations to use results-focused organizational strategies and program activities. Leaders' use of the Results Count tools from the Fellowship progressed from applying tools to improve their personal leadership approaches to using tools with staff and colleagues. Next, leaders (in collaboration with their staff) began integrating tools as part of new work practices, and increasingly used tools with partners over time. These experiential learning cycles effectively helped leaders progress through the three stages of learning (i.e., cognitive, associative, autonomous) and contributed to skill retention and behavior change. Figure 2 below highlights how leaders progressed through the three stages of the cognitive learning process and created changes likely to be resilient in the face of obstacles.

Figure 2. Leaders' Progression Through the Three Stages of Learning




Sustained Support From Participants' Sponsors Fortifies Changes

Evaluation results also indicated how the program attempted to maximize one of the biggest predictors of individuals' ability to embed new skills into daily work practices – sustained, authentic support from a supervisor or program sponsor.¹² Ensuring that leaders' supervisors and/or sponsors are fully knowledgeable about the program and are supportive of Results Count activities facilitated both individual learning and organizational change. Figure 3 outlines the ideal ways of securing supervisor support and relevant practices observed during the Fellowship evaluation.

¹² <https://www.ccl.org/articles/white-papers/bosses-can-break-leadership-development/>

Figure 3. Securing Supervisor and/or Sponsor Support

 IDEAL PRACTICES ¹³	 PRACTICES OBSERVED DURING FELLOWSHIP EVALUATION
Before the Program	
If supervisors/sponsors are not familiar with the program, they receive educational materials (i.e., readings, videos, webinars, program alumni interviews) to understand the program’s goals, key activities, and expectations. Then, sponsors and learners co-create an individual development plan to identify how learning will be applied.	ICF observed that the Fellowship application included information about the program’s goals, key activities, and expectations, and required sponsors to sign a support declaration.
During the Program	
Sponsors proactively check on progress, offer input about applying what is learned, and reinforce interim successes.	Fellows and their colleagues mentioned a need for more user-friendly materials (i.e., videos, short articles, webinars) that build a high-level understanding of the concepts and help Fellows’ organizations understand what the Fellow is going through.
After the Program	
Sponsors showcase the learner’s accomplishments across the organization, with higher level organizational leadership, and with external stakeholders.	Evaluation data indicated that the level of support exhibited by sponsors varied, including some sponsors who did not follow through on their support declarations.

To build on the practices observed during the evaluation, Casey could provide user-friendly materials to Fellows’ supervisors and/or sponsors, such as videos and recorded webinars.¹⁴ During the Fellowship, Casey could monitor how supervisors and/or sponsors are maintaining their commitment by examining the extent to which Fellows are encouraged to experiment and apply learning to daily actions, sponsors help link Fellows’ learning to the organization’s challenges and goals, and Fellows’ colleagues report visible evidence of sponsor support.

The Benefits of Coaching and Modeling to Create Desired Behavior Change

Aside from experiential learning cycles and efforts to maximize support received from participants’ sponsors, evaluation findings indicated that faculty coaching was one of the most valuable mechanisms to address the realities of transitioning to a results-focused organization. Leaders received coaching in several forms. First, during seminars, leaders received “interrupt coaching” during role-play exercises. Second, in between seminars, leaders received individual

¹³ Neves, P. (2011). Building commitment to change: The role of perceived supervisor support and competence. *European Journal of Work and Organizational Psychology*, 20(4), 437–450.

¹⁴ Access videos located here: <https://www.aecf.org/work/leadership-development/results-count/>

virtual coaching. Third, at two points in time during the Fellowship, faculty visited leaders at their home organizations to provide coaching and in some cases help co-design and/or lead critical events. However, leaders reported they did not always understand how to use the coaching, especially if they were novices to coaching. Leaders could have benefited from guidance regarding how to utilize their coach most effectively.

To address the intricacies of various organizational contexts, the Fellowship program developed critical competencies in leaders but also helped leaders guide their staff to develop these same competencies. Successful leaders purposefully and visibly demonstrated to their peers and staff new ways of working. Evaluation results indicated that leaders modeled behaviors associated with the Results Count competencies, used results-based facilitation techniques in nearly every meeting where the leader served as facilitator, and progressively used results-focused tools over time with their staff and ultimately with their partners.

Evaluation data also demonstrated how each leader used different approaches and tools to affect their organizational environment and produce results in their organization, teams, and/or communities. Depending on the organization type, the focus for improving child and family well-being, and the existing dynamics in the system within which their organization resided, leaders selected those tools or approaches best suited to their needs. One leader shared that during prior leadership development programs, tools were introduced and then used one or two times. In contrast, the Fellowship program guided leaders to keep cycling through various tools that help address racial disparities and experimenting with different tools in their organization.¹⁵ Leaders found that they could first experiment and later formally integrate those tools proven to be effective, thereby gaining traction as they shifted the culture of the organization.

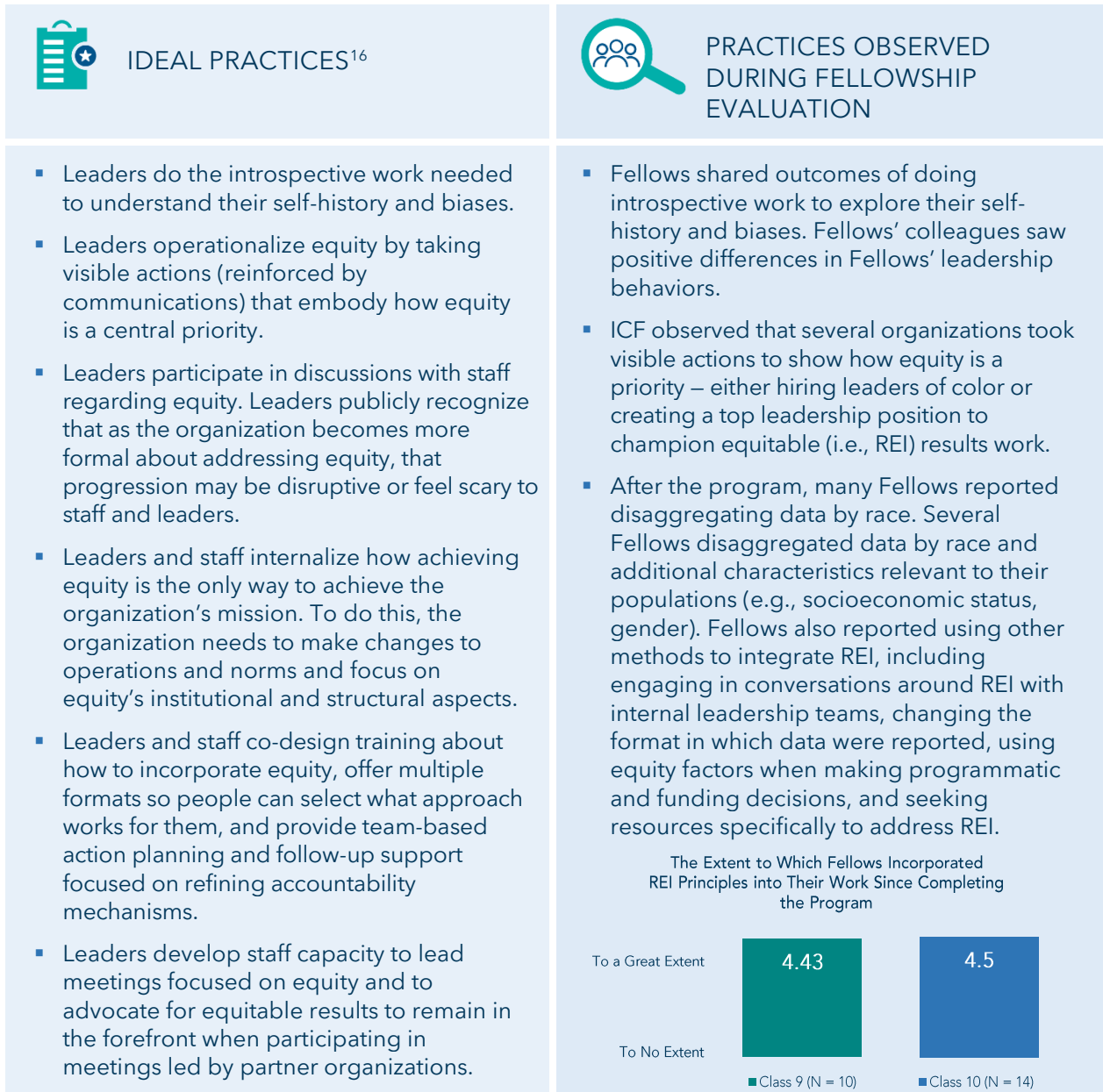
As leaders moved from using tools to improve their personal leadership to using tools with colleagues and partners, results-based practices became part of how work was performed. For example, leaders' colleagues reported they began leaving meetings with clarity regarding next actions and how to support each other while simultaneously holding each other accountable. These adjustments led colleagues to fulfill their responsibilities in a more targeted, data-driven manner, as well as maintain a holistic view of their coordinated efforts with peers and partners. When leaders used results-focused tools selectively depending on the situation, they more effectively formalized tools into organizational strategies and programmatic activities.

Keeping Race Equity and Inclusion in Focus

One of the major goals of the Fellowship was to build leaders who can advance equitable results for children and families. The program helped leaders communicate their commitment to equity, identify root causes of inequities, and provide a framework for coordinated work toward equitable outcomes. Leaders took individual actions to reinforce the criticality of keeping equity at the forefront. Additionally, leaders drove formal changes in their organizations to reinforce a focus on equity. Figure 4 outlines the ideal ways of elevating equity (i.e., race equity and inclusion) and relevant practices observed during the Fellowship evaluation.

¹⁵ One Class 10 Fellow reported that the tools were helpful but suggested that the program needs to be careful about bringing in too many tools and recommended that instead the program introduce fewer tools and cover each tool more deeply.

Figure 4. Elevating Race Equity and Inclusion



To further elevate equity, Casey has revised guidelines for participants’ Results and Equity Plans to reinforce establishing shared values in support of difficult dialog and inspecting multifaceted root causes. Casey also adjusted the Fellowship content and instruction to intentionally guide leaders’ strategic thinking around systems, policy, and cultural issues to address disparities and create equitable outcomes. Additionally, Casey refined Fellowship activities to help leaders cultivate a deeper understanding of the work needed to support policy changes or strengthen advocacy networks.

¹⁶ *Operationalizing Equity: Putting the Annie E. Casey Foundation’s Racial and Ethnic Equity and Inclusion Framework Into Action.* (2017). The Annie E. Casey Foundation.

Changing Culture and Work Practices to Generate Big Results

Choices made by individual leaders to apply what they learned during the Fellowship influenced their organizations' trajectory toward fully embracing a results focus. Evaluation results pointed to several actions that, when pursued with commitment and perseverance, helped teams, the organization, and its partners generate big results.

Addressing Resistance and Increasing Openness to Results Count

Evaluation results demonstrated that the approaches leaders learned increased collaboration and cohesiveness among their work teams, improved their work teams' performance, and pushed work teams to become more results and data focused. Specific approaches included using self-awareness to adjust leadership behaviors across situations, an increased use of data and results, and enhanced facilitation skills.¹⁷ Faculty site visits to leaders' organizations encouraged colleagues to view a results focus as an effective discipline. As one leader remarked, "The faculty visits were points that accelerated the receptivity of the organization, and made people focus on making sure their results were sound."

Adaptive Leadership, one of the Results Count competencies, was viewed as a very powerful competency for individual leaders. Learning how to identify adaptive challenges (i.e., non-technical barriers) helped leaders effectively transform resistance into acceptance and, in some cases, advocacy. Several leaders reported that historically they were encouraged to find technical solutions to problems instead of addressing necessary shifts in mental models and behaviors. Leaders also reported that using behaviors associated with the Self as Instrument of Change Results Count competency effectively addressed resistance. Figure 5 presents examples of what leaders did to positively affect their organizational environments, as well as examples where leaders struggled to create receptive environments.



Figure 5. How Leaders Positively Affected or Struggled to Create Receptive Organizational Environments



Leaders Positively Affected Organizational Environments



Leaders Struggled to Create More Receptive Organizational Environments

Going beyond anecdotes to showing data

"[My organization is becoming more receptive as people understood] . . . the value behind adopting this kind of school of thought. People are starting to realize that stories alone aren't enough, you need data to support the impact the program is having. Data is accountability . . . [We] helped reshape [the] perception of how they use data. [We] introduce it to staff to recognize efforts instead of pointing out what they aren't doing. [We] adopted data walks in almost every meeting." – Fellow

Trying to shift values, habits, and behaviors

"Everyone shows receptivity to concepts, but I'm not sure how much it is being implemented on a daily basis . . . [I] can only do so much to require something [since I am] leading from the middle. It's different from group to group, certain people are using it more regularly, if I had different authority I could say, 'This is how we do business.' . . . I'm trying to work through my leadership, instead but that is a slower process." – Fellow

Using data to guide programmatic activities

"I have tools I use on a regular basis; we are very committed to . . . data-focused program planning. There is a lot of attention being paid to what that means on the ground. The Fellowship tools have been very useful in that." – Fellow

Challenges building capacity in overloaded staff

"Mostly it's people being overwhelmed with their jobs, doing new things is overwhelming despite being interested . . . [the lack of receptivity is] not based on the tools, people are just maxed out." – Fellow

Most leaders who participated in the evaluation improved the openness to Results Count within their organization's climate, culture, and operational environment. Depending on where an organization started along the continuum of receptivity, incremental changes slowly took hold in staff awareness, action, and later advocacy. In a few cases, after many attempts to positively influence the environment, leaders elected to depart their organizations for other organizational environments where they could make a bigger impact. Evaluation data from leaders and faculty indicated that such job changes were a positive outcome of Fellowship program participation, because leaders ultimately resided in organizations where they could fully apply Results Count to advance results.

Using Data in Work Practices to Maintain Focus on Desired Results

As referenced throughout this report, one important element of spreading a results focus involves using data to help others see the end goal. Colleagues reported that their leaders used data to effectively engage with various stakeholders both inside and outside the organization. Many leaders convened formal data gatherings, activities that helped organizations and partners disaggregate data and promote data tracking. Leaders organized data walks to educate staff and stakeholders about the disparities in outcomes and to socialize transparent treatment of data. Several leaders led efforts to publicly release data to the community, either in the form of an equity report or via data dashboards on their organizations' websites. Some leaders' efforts helped increase inclusivity, as this colleague shared:

"[Fellow] is looking at disaggregated data for populations of interest, she's put the data in front of community members where we've had good success with getting the communities involved, they feel more appreciated and directly supported by what we are doing."
- Corporate Services Representative

Focusing on the end goal and defining goals in terms of how well the organization is helping children and families (i.e., to what extent are they better off) instead of how much assistance is provided (i.e., the quantity of people helped in a given program) was a critical emphasis for Fellows and their organizations, as noted by a leader:

"I've been able to use some of [Casey's] tools . . . to work with other non-profits to . . . [help them] think about the difference between how much and how well, in this case on behalf of students in school districts. So that's been very impactful." - Fellow

Leaders' colleagues also highlighted how keeping attention on the end goal benefited individuals and teams. One colleague shared that when the leader approached them about making a policy shift in real-time and then followed up after thoughtful examination, the colleague felt valued and appreciated. In such cases, individual engagement in and commitment to the work was more likely, and as one leader remarked, regularly sharing data in a collaborative fashion fostered an appreciation of the power of iterations:

"The Superintendents were talking about a growing absenteeism rate but hadn't disaggregated data . . . we're in the process of doing root cause [analysis] with them now . . . by sharing the data [we signal] to the community our desire to be transparent and our desire to partner, which is a shift in our culture. It's been really important for us to sit at [the] table and say here's what we see, and we don't know what to do, and let's have a conversation. Instead of putting on the hat of the leader who knows everything . . . [we consider] what real collaboration looks like and how to be iterative in our work so we can introduce the concept of rapid cycle iteration."¹⁸ - Fellow

Additionally, leaders' interactions among their peers in the Fellowship permitted them to work alongside leaders from diverse sectors. Leaders noted that such exchanges among participants working in different sectors accelerated their learning and encouraged experimentation. Leaders found inspiration for doing the work to positively impact children and families. Most leaders took this increased enthusiasm and applied it to their efforts to inspire others at their workplace. As one leader described it, "I think the peer experience

among the Fellows and the cross-sector reality of change solutions . . . has genuinely helped me inspire others to look at their work in a similar way.”¹⁹

Engaging External Partners and Aligning Efforts

As the following quote illustrates, leaders might have been working with stakeholders on common population indicators, but moving to shared performance measures and using data to make programmatic changes was a significant evolution.

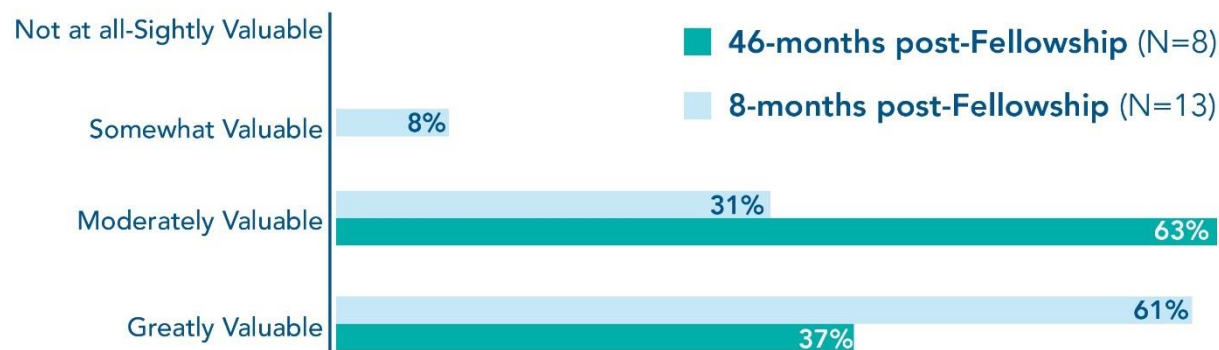
“While I was successful in working with many stakeholders before I joined the Fellowship and we were working toward common population indicators, we were not necessarily focused on performance measures . . . It has been a shift for partners to come along this journey and I have had to spend a lot more time in developing trust in relationships to move in this direction.” – Fellow²⁰

One leader shared how implementing successful partnerships focused on shared performance measures required purposeful communication, understanding stakeholder motivations, and demonstrating sensitivity to their concerns.

“[The] Fellowship . . . enabled me to . . . couple the RBA pieces with adaptive leadership and the work on self to understand that when you go into a group of stakeholders, coming to them with the data self-righteously about disparities is not going to get people to work with you. Really thinking about how your communication style . . . is impacting the role you play and how you’re coming across, and what it really means to be honest about performance measures in a way that isn’t self-protecting your own organization. Those are the kinds of things . . . that [have] . . . been the most valuable.” – Fellow²¹

Most leaders reported the Fellowship was valuable for their external partnerships, with the majority of Fellows rating the program’s value highly, as evidenced by Figure 6.

Figure 6. Value of Fellowship to Leadership Relative to Working Outside of Organization, Such as With Stakeholders



¹⁹ Data collected from Fellows during the program.

²⁰ Data collected nine months into the Fellowship.

²¹ Data collected nine months into the Fellowship

Leaders explained that the program built upon foundational skills they possessed upon entering the Fellowship. Several leaders reported that experiences during the program provided them the inspiration and support to push the boundary, develop new relationships, and bring people to the table in a very focused way to achieve measurable outcomes. Several leaders stated that the program helped them think differently about partners' positions. Leaders understood that when proposing ideas outside of the comfortable status quo, it helped to approach others as if they were counseling people through loss and helping people envision themselves on the other side of losing the comfort and familiarity of the status quo. Successful leaders resisted the tendency to become defensive, and instead adopted the consultative stance and raised effective questions so people could reflect and remain authentically engaged.



Conclusion

ICF's longitudinal evaluation of Casey's Children and Family Fellowship Program highlighted how leaders and their organizations incrementally adopted a results focus to positively impact the well-being of children and families. Evaluation evidence demonstrated the ability of the Fellowship program to develop individual leaders from nonprofit, philanthropic, and public organizations into visionary leaders capable of inspiring significant improvements for children and families. Evaluation results also established that the Fellowship helps develop leaders who can effectively inspire changes in how their organizations function. To embed a results focus, leaders progressed through the Fellowship's intense experiential learning cycles that exposed them to tools and approaches, encouraged them to experiment with new behaviors associated with critical Results Count competencies, and guided how they reflected on interim experiences to refine their actions. While the Fellowship employed a set of techniques (e.g., individual coaching, peer-to-peer exchange, webinars, small group application exercises) to grow individual leaders, the program primarily sought to develop leaders who create and sustain changes in how organizations serve children and families.



Photo Credit: The Annie E. Casey Foundation

Adoption of a results focus was not an easy task for leaders, as many encountered dynamics that constrained their success both within their organizations and when collaborating with external partners. A natural resistance to change exhibited by employees and leaders, compounded with perceived risks associated with repeatedly showing data in a transparent fashion, created challenges. While the Fellowship program offered a variety of tools and flexible approaches, leaders reported that the program introduced a large quantity of tools at a high level of abstraction. Sometimes leaders struggled to customize the tools and approaches to fit their respective organizations and systems. The Fellowship program faculty offered virtual coaching to help leaders tailor tools, and leaders continued to alter tools and approaches while integrating into formal organizational practices and programmatic activities.

The theme of customization and adjustment extended to how ICF performed the Fellowship evaluation. Our evaluation research design went beyond using self-report data to include assessments from multiple perspectives – Fellows, their colleagues, their external partners, and program faculty. Further, our three-year research design permitted us to examine interim effects and how results-focused approaches became part of Fellows' work tasks. A close partnership among ICF's evaluation experts, Casey's Fellowship staff, and Casey's own research and evaluation experts fueled a responsive, flexible approach to the evaluation. For example, we elected to add on-site observations, multi-rater assessments, and success case interviews to the original research design. Future evaluation efforts might expand on the current use of multi-rater assessments to capture how leaders, their colleagues, and their partners exhibit Results Count behavioral competencies over

time. Additionally, since we found specific work practices to signal the extent to which an organization embraced a results focus, an organizational assessment measuring those work practices could illustrate how organizations progress through various stages of adoption.

Organizations and leaders who seek to deliver tangible results for children and families by adopting a results culture could begin by articulating the population-level result(s) they wish to achieve and being more intentional about examining data on a routine basis. Leaders and organizations might consider incrementally challenging the status quo by asking questions about the data – including what the data mean and what story the data may tell about target populations. Disaggregating trend data to identify disparities and examining root causes can help refine performance measures and population indicators. Refined measures can more readily inform adjustments to organizational strategies and program activities. During the Fellowship program, leaders' experiences working alongside other program participants from diverse sectors and organizational types accelerated their learning and cultivated enthusiasm. Leaders and organizations could generate similar inspiration to adopt a multidisciplinary viewpoint, engaging external partners and aligning efforts with others around shared performance measures. To accomplish this multidisciplinary focus, organizations and leaders must develop strong partnerships across historical boundaries, often coordinating efforts among previously siloed groups and persistently working alongside partner organizations to make coordinated changes and equitable impacts. Organizations and leaders could also consider providing training for staff in accountability for equitable results, offering data gathering events on a regular cadence, promoting how disaggregating data helps the organization achieve its mission, and modeling the use of data tracking methods. ICF's evaluation results demonstrated how capable leaders can make lasting impacts when a results focus becomes embedded in organizational strategies and work practices. Organizations can maintain an emphasis on equitable results in the face of policy and environmental trends that threaten the well-being of children and families.



Glossary of Terms

3R Agenda – A meeting or event agenda that highlights the Relationships and Resources needed to achieve the meeting or event Results. Organizers articulate desired results for each component of a meeting or event, and facilitators lead the meeting in a manner that emphasizes achieving results. Participants identify required relationships and resources to accomplish each result. 3R Agendas can be used for stakeholder outreach events, executive leadership team meetings, other multi-partner initiative progress meetings, and program review meetings.

Action Commitments – A structured method to create ownership for next steps at the conclusion of a meeting or event. Participants specify intended actions, owners, timeframes for completion, and, where possible, metrics best suited to demonstrate to what extent completion occurs. At the next gathering, participants check completion of prior commitments, identify reasons why commitments were not achieved (if relevant), and identify new commitments.

Data walks – A method used to explore data pertinent to desired results for children and families. Typically, a large visual prominently displayed shows the desired outcome and request for action. Participants view a series of “posters” containing charts (e.g., bar graphs, pie charts) and stories. Participants discuss how these data came to be and what they mean. Participants also discuss the current situation for the target populations of interest and the goal, with results disaggregated by relevant demographics (i.e., race, gender, socio-economic status, geography). Participants discuss disparities and ways to address inequities. A facilitator guides a discussion regarding participants’ insights and ideas on achieving desired results and measuring improvement along the way. One benefit of this approach is to surface how data makes participants feel, since emotional responses often help move people to action with more urgency. Data walks help groups reach agreement on which data to use in developing (or refining) strategies to achieve goals and track progress. Source: <https://www.aecf.org/blog/data-walk-is-a-key-tool-in-results-based-leadership/>

Equitable results – Equitable results occur when an organization achieves better outcomes for all children and families while simultaneously addressing factors that contribute to racial inequities and block access to opportunity. Activities inherent in pursuing equitable results include examining and attending to systemic factors that perpetuate uneven results while factoring in historic and structural inequity and bias that situate populations differently. In addition, organizations use an approach called targeted universalism, where actions seek to be inclusive of the needs of both dominant and marginal groups while paying attention to the situation of the marginal group(s). Organizations also develop strategies designed to achieve equitable results, and in so doing, distinguish between equality (treating everyone the same) and equity (giving everyone what they need to be successful).

Experiential learning cycle – A method used in adult learning that begins with capturing the interest and engaging the learner in the topic. Next, the learner explores the topic and constructs knowledge through facilitated questioning, experimentation, and observation of effects. Then, the learner experiments with applying what was learned during training and then returns to the learning environment to reflect on what occurred and decide on future refinements.

Performance measures – Measures of how well a grant portfolio, initiative, agency, organization, individual program, or unit/department is working. Rather than measuring whole populations, as do population-level indicators, performance measures quantify the quality and effect of specific grants, activities, or programs. (Performance goals are desired levels of results on specific performance measures within a set time frame.) Performance measures enhance an organization’s understanding of how well its investments are working and what results they are producing. Performance measures are used to track results consistently at the grantee, program, and Foundation levels and to align more closely the Foundation’s work and the work of its grantees and partners around priority outcomes for children and families. Source: <https://www.aecf.org/resources/a-road-to-results-a-performance-measurement-guidebook>

Population indicators – Measures of circumstances experienced by a target population of interest. In the case of child and family well-being, each population indicator measures a single dimension of health and, thus, sets of population indicators accompany performance measures (see above). A given theory of change directs which population indicators accompany various performance measures.

Results Action Plan – Fellows identify a measurable change that he or she plans to achieve by the end of the Fellowship program. They create a structured plan to be followed and refined throughout the Fellowship as each Fellow works with his or her organization to create results.

Results-Based Facilitation – A set of facilitation strategies that help individuals design, lead, and contribute to meetings in a manner that effectively moves groups from talk to action and holds participants accountable for advancing the work. Source: <https://www.aecf.org/blog/the-5-2-2-of-results-count>

Results Count Competencies – Five behavioral competencies are part of the foundation of the Fellowship program. Adaptive leadership addresses how to become aware of the impact that values, habits, beliefs, attitudes, and behaviors have when taking action to improve results. Collaborative leadership captures how to work with others using shared performance measures. Equity relates to how one can bring attention to and act on disparities to advance equitable opportunities. Results Accountability conveys how to be results focused and data driven, establishing clear targets and using data to assess progress and change course as needed. Self as Instrument of Change refers to how leaders can use themselves as an instrument of change to move a result, based on the belief that individual leaders are capable of leading from whatever position they hold. Source: <https://www.aecf.org/blog/the-5-2-2-of-results-count>

Results Partners – Colleagues who are invited to participate in the Fellowship (i.e., attend two seminars, receive guidance from Fellowship faculty) due to their instrumental role to Fellows’ results work. Results Partners can be from within a Fellow’s organization or from a partner organization. Fellows and Results Partners engage in semi-structured activities to strengthen and accelerate Fellows’ pursuit of desired results.

Stakeholder analysis – A structured examination of those stakeholders relevant to a particular result for children and families. Includes identifying various stakeholder motivations, needs, preferred communication styles, and constraints each stakeholder experiences given their role in the overall system. In the Fellowship, Fellows create and refine a stakeholder analysis throughout their pursuit of their desired results for children and families.

Making Results Count

Influencing Organizations to Achieve Population Results
Through the Casey Children and Family Fellowship

May 2020

