

SCALING SUCCESS: OPPORTUNITIES AND CHALLENGES IN GROWING A LOCAL YOUTH DEVELOPMENT PROGRAM

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I. EXECUTIVE SUMMARY

Low socioeconomic status students have lower rates of high school and college graduation, resulting in lost income-earning potential and in perpetuating the cycle of poverty (Zarifa et al. 2018). Tall Oaks Kids (TOK) works with students in low-income neighborhoods and has created a successful model to disrupt this cycle. Graduates of TOK complete high school and college at significantly higher rates than their low-income peers. TOK was founded in 1995 in a city in the northeastern United States. TOK offers after-school programming, including teen internship and mentoring, after-school centers, music schools, college and career preparation, counseling and therapy, family literacy support, and a sailing school.

Since 2011, the organization has launched five new sites in three new cities and has created a national office to support the new sites. As the model has expanded, the founders are concerned about replicating the current success as it scales the model. They recognize the challenges that come with replicating and scaling a successful model to support strong and consistent culture, leadership, program and organization across each location.

In studying the phenomenon of organizational change, this project will utilize Coburn's (2003) conception of scale as a framework for examining TOK's growth. While growth is traditionally measured through the number of students served, Coburn expands the concept of scale to include four dimensions: depth, sustainability, spread, and ownership.

The study attempts to answer questions about scaling outcomes in the areas of depth, sustainability, spread and ownership, and the scaling processes in culture, program, leadership and organization. The study employs a mixed-methods approach, with an emphasis on qualitative data informed by quantitative data. Interviews with executive leaders and focus groups with program leaders were conducted using questions designed around the four dimensions of scale. Responses were coded by themes and triangulated using organizational data and documents.

The questions and findings are as follows:

Study Question 1: To what extent has TOK achieved depth, spread, ownership, and sustainability in its scaling efforts?

Specifically, how has TOK achieved depth in its scaling efforts?

Finding: TOK shows depth through shared understanding of core values and the relationship-driven approach to youth empowerment among staff members across sites.

Specifically, how has TOK achieved spread in its scaling efforts?

Finding: The culture of caring and the relationship-driven approach to leadership development has spread to fundraising and has begun to spread to staff. However, some acknowledge that there is more work to do in the area of staff development.

Specifically, how has TOK achieved sustainability in its scaling efforts?

Finding: Staffing and funding are the greatest challenges to sustainability in the scaling efforts. The leadership is creating mechanisms to address these challenges including the development of a leadership pipeline and a change in the funding model.

Specifically, how has TOK achieved a shift in ownership in its scaling efforts?

Finding: A shift in ownership is emerging as fundraising, finance, communication, human resources and strategic planning become centralized allowing local sites to focus on programming.

Study Question 2: What are facilitators and barriers for TOK in achieving successful scaling?

Specifically, what are the facilitators for TOK in achieving successful scaling?

Finding: The culture, program, and leadership are interactive components that facilitate successful scaling.

Finding: The establishment of a national office has allowed the organization to centralize functions allowing for improved consistency and efficiency.

Specifically, what are the barriers for TOK in achieving successful scaling?

Finding: Evolving and ambiguous organizational structures and systems present barriers for TOK at this stage of its scaling efforts.

Based on these findings, several recommendations have emerged:

Recommendation 1: Continue to centralize fundraising, finance, communication, human resources and information systems while providing local autonomy in program development.

Recommendation 2: Identify and implement the minimal critical elements in the programming model.

Recommendation 3: Refine and enhance internal communication practices both vertically, from the national office to the sites and vice versa, and horizontally, from site to site.

The work has several limitations. Timing presents a limitation. Interviews were conducted in June 2020, and focus groups were conducted in January 2021. All of the perspectives have been influenced by the impact of the COVID-19 global pandemic and were done through Zoom.

More specifically, the June 2020 interviews with the executive leaders were completed after a leadership summit, conducted prior to the crisis, in which the mission and core values were refined and articulated, possibly resulting in an increased awareness of their impact on the operations of the organization. The January 2021 focus group interviews were conducted with staff members in the midst of the operational challenges of the pandemic. The interviews and focus groups were limited to staff in either executive or program leadership roles. The study did not capture the perspectives of other stakeholders in the program, including teaching staff, families, youth, or community members.

II. INTRODUCTION

Tall Oaks Kids (TOK) was founded in 1995. After some unsuccessful attempts to start a church in an urban center in the New York City metropolitan area, a pair of recent seminary graduates began working with neighborhood children and youth. Those efforts led to a uniquely successful program model. TOK currently serves hundreds of urban children and teenagers through a teen internship program, an after-school center, tutoring, music lessons, counseling services, college and career preparation, sailing lessons and family literacy support. Students can enter at various points in the system. Those who complete the teen internship program have a 100% high school graduation rate, a 99% college matriculation rate and a 92% college graduation rate.

Since 2011, five additional sites in three new cities have been launched. With growth, the founders have recognized the need to scale the model. They have created a national office that can support local sites. They recognize the challenges that come with replicating and scaling a successful model to support strong and consistent culture, leadership, programing, and organization across each location.

The purpose of this capstone project is to use the following questions to guide the research and to inform the recommendations for the TOK leadership:

To what extent has TOK achieved depth, spread, ownership and sustainability in its scaling efforts?

What are facilitators and barriers for TOK in achieving successful scaling?

This project explores how successful TOK has been in their scaling up efforts. I use interviews from both the national office and program sites. This project considers success at scale to be a combination of depth spread, shift in ownership, sustainability. Success can be measured in a variety of ways. While growth in the number of youth served, or new sites started are some ways of measuring success, these metrics do not capture the qualitative factors needed for the breadth and depth of change needed for successful scaling. The opportunities and challenges that TOK faces in replicating and scaling its model will be viewed through the framework of four interrelated dimensions of scaling which include depth, sustainability, spread and ownership (Coburn, 2003). Depth refers to the importance of change that goes beyond the surface to changes in foundational assumptions and beliefs. Sustainability is the endurance of an initiative over time, after the initial push for implementation. Spread refers to the growth in numbers of students impacted, as well as the growth of norms, beliefs and principles. A shift in ownership happens when the culture becomes internalized throughout the organization.

III. ORGANIZATIONAL CONTEXT

Site context

TOK's initial site is located across the Hudson River from Manhattan, NY. Despite stunning city views, convenient commuting and rapid gentrification, the public schools are ranked low, by many measures. It is one of 31 Abbott districts in the state, which reflects its challenges in securing equitable funding, and which has made it a site of several state reform efforts. According to the New Jersey Department of Education, 58.2% of the district's 29,010 students are economically disadvantaged. On statewide assessments, 47.8% of students in English language arts, and 34.1% in math, met or exceeded expectations. The four-year graduation rate is 79.2%. Students fall below state averages in measures of college and career readiness including AP/IB and dual enrollment courses, industry-valued credentials, and college enrollment. In 1989, the state of New Jersey assumed control of the public school system because it met the state criteria as a failing district. In 2017, the state moved to return the district to local control on a probationary basis, but to date, the district has not made adequate progress towards its goals to merit full control (Rosario, 2020).

Low socioeconomic status students demonstrate lower rates of college attendance, and are also more likely to drop-out, or take longer to complete their degrees, resulting in higher expenses, and lost income-earning potential (Zarifa et al. 2018). Interventions to support children and teenagers are often implemented in schools. School programs can make opportunities available to a large number of students who spend much of their day in that environment. However, not every school is equipped to provide the additional support and interventions. Some schools are struggling just to complete their educational mission. After-school programs can provide support and resources for students in a way that overtaxed urban school districts are not in a position to provide.

TOK mission, core values and program model

In 1994, a pair of seminary graduates who had a passion for justice, racial integration and urban ministry began work in the city. After several false starts, a vision emerged. As one of the founders explained, "We didn't have anybody. We didn't have money. We didn't have staff. We didn't have any other resources to pull it off. But what we did have was a group of ragtag middle school kids following us around, and it just finally occurred to us that it was the kids that were already living there that were the change agents that we could rely on. When we made that switch our whole approach changed." Their focus moved from adults to youth.

Tall Oaks Kids (TOK) began offering after-school programming to urban youth at its initial site in 1995. The program currently operates in five sites across three cities. TOK's vision "is to bring whole life transformation to urban children by leveraging academic, leadership, musical and spiritual development in a community of loving support." Its five core values are incorporated into the mission statement and inform its programming model and implementation. They are emphasized in all staff training and represented visually and through storytelling. Programming is based on a model that has been developed by the organization that focuses on

Spiritual, Leadership, Academic, and Musical strands, with a goal of 40% of teens who increase their developmental asset scores (SLAM 40).

TOK programs

TOK offers a range of programming for school-age youth. Over 100 high school students are involved in its Teen Life Internship Program and 442 teens have been served by the program since 2015. Teenagers spend at least 12 hours a week, over the course of a year, in a paid internship. The program provides opportunities for teenagers to teach and lead younger students through tutoring and arts education. In addition to mentoring younger students, the teenagers receive significant leadership training and are mentored themselves. According to the 2020 Annual Report, since 2007, 100% of alumni have graduated from high school and 92% of students are in or have graduated from college. According to the director of TOK, interns are 10 times more likely to graduate college than the national average for low-income students.

TOK's After School Center serves 338 first through eighth grade students. All of the students receive academic support through tutoring, and 235 students participate in Music School. Teen interns, under adult supervision, serve as tutors, leaders and role models. Other programs include Brighter Day, which provides counseling and therapy to students who have experienced trauma and adverse childhood experiences. College and career preparation is provided through SAT classes, college application support, internships and college visits. Additionally, in cooperation with other local organizations, TOK runs Families for Literacy, which supports immigrant families, and City Sail, which provides students with sailing lessons.

Theory of action

The organization has a detailed logic model (Appendix A) that links inputs, programs, outputs, and short-term, intermediate, and long-term outcomes. It measures progress towards outputs and outcomes through Key Performance Indicators (KPIs). The KPIs are updated and reviewed by the leadership teams on each site and the national office on a quarterly basis. The KPI dashboard, known within the organization as The Deeper Dive, includes programming, fundraising, finance, staff development, and care with metrics that are tracked quarterly by each site and the national office.

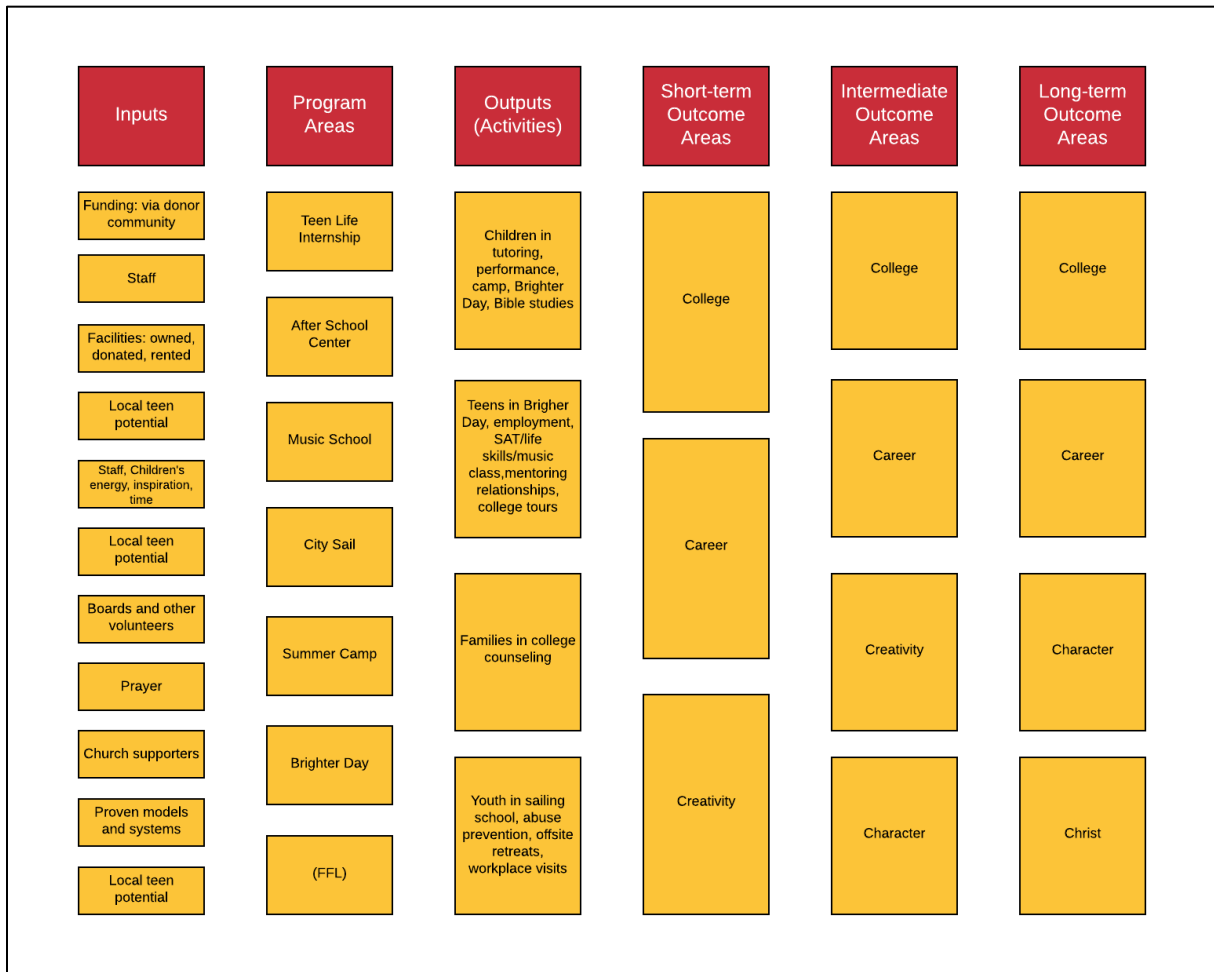


Figure 1: TOK Abbreviated Logic Model

IV. AREA OF INQUIRY

Based on the success of its initial site, the organization began efforts to replicate and scale the model. A second site in the Northeast was launched in 2011. In 2014, a third site was planted in a Midwest city. In 2015, additional fourth site and fifth sites were launched in the Northeast. A sixth site is planned for another Midwest city in 2021 (Tall Oaks Kids, 2020).

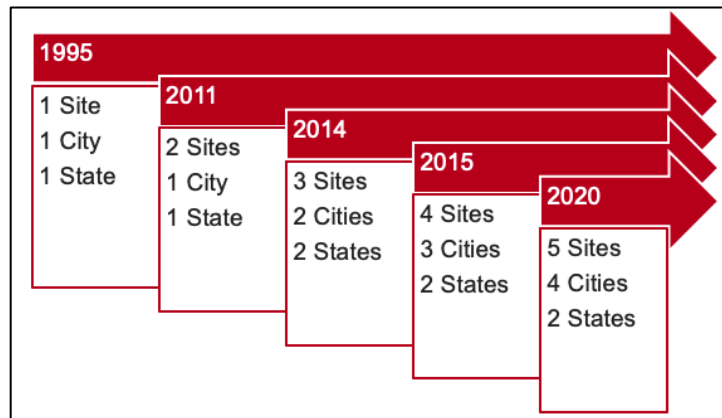


Figure 2: TOK Growth

The organization has grown from a single-site model to a multi-site and multi-city model in fewer than 10

years. The number of children and youth it serves, employees, programs, sites, and cities are increasing exponentially, and the rate of change is accelerating. The founder, who also serves as the executive director, has identified some challenges involved in scaling the model.

The organization is at a crossroads and the founder and board need to make decisions regarding programming, leadership, organization, financial systems, and other structural issues. The founder is concerned with maintaining the strength of their model as they continue to expand. In an interview, he explained, “When Tall Oaks Kids began to expand in 2011, we focused our energies on the staff, money, and knowledge processes we would need to launch the very next site of Tall Oaks Kids. Now that we have successfully launched five sites, we have come to understand the need to focus not on the challenges of the next launch, but on an overall system of infrastructure, knowledge, money, and talent that work together.”

V. LITERATURE REVIEW AND CONCEPTUAL FRAMEWORK

In studying the phenomenon of organizational change, this project will utilize Coburn's (2003) conception of scale as a framework for examining TOK's growth. Coburn challenges the traditional understanding of scale as strictly quantitative and replaces it with a conceptualization with four dimensions including, depth, spread, sustainability, and ownership. While Coburn's framework is explicitly applied to school reform, the principles can be applied to the TOK model since it shares the elements of a school environment including assumptions about the teaching and learning process, and interactions between adults and students.

Depth

Coburn's first component of scale is depth, which focuses on the extent to which stakeholders deeply understand and enact the beliefs and values of the program. They should move beyond surface level features to enact the underlying principles.

Deep change requires a fundamental shift in the way adults view the nature of learning and a reconstruction of ways in which learning happens. It includes a shift in the way the interactions happen between teachers and learners and in the underlying pedagogical principles.

For TOK, underlying core beliefs inform both the culture of caring and the pedagogical approach. The culture of caring is important to TOK because of the altruistic motivations driving their inception and approach. Organizations should consider ways in which they can develop a culture of organizational care that will both assist in the scale-up process and that will help the organization be sustainable (Andre & Pache, 2016). The pedagogical principles are driven by the core values, implemented through the SLAM40 programming model and articulated in the founder-developed concept of resonance, which focuses on frequent repetition of key concepts across engaging mediums.

Spread

Spread includes a growth in numbers of students impacted, as well as the growth of norms, beliefs, and principles (Coburn, 2003). Spread is evident when the norms, beliefs, and principles extend beyond the classroom to the policies, procedures, and professional development.

There are a number of programming factors that have led to TOK's initial success that would need to be maintained in the spread and culture dimensions of a successful scaling effort. Lerner et al. (2014) identifies three attributes of youth development programs as well as outcomes in five areas that are key to healthy growth. Attributes include positive and sustained adult-youth relationships, skill-building activities, and youth leadership opportunities. Outcomes include competence, confidence, character, caring, and connection. In addition, Fredricks et al. (2014) identify engagement through relationships with adults and peers and interactive activities as key factors in successful after-school programs. TOK programming includes all of these attributes.

Adult-youth relationships take place through multiple levels of youth mentoring which is a component in all TOK programming. Teenagers who are mentored have a reduced risk of delinquency, drug use, aggression, and drop-out patterns (Tolan et al. 2014). Youth mentoring is

also associated with positive academic and career outcomes, as well as with greater self-esteem and positive social relationships (Eby et al. 2008). A meta-analysis of independent evaluations for mentoring programs concluded that, “Collectively, these findings point toward the flexibility and broad applicability of mentoring as an approach for supporting positive youth development” (DuBois et al. 2011). The authors also identify the selection of youth and mentors, and the types of activity as key factors in the success of the mentoring programs. Additionally, programs that combine youth mentoring with tutoring show positive effects on both academic performance and students’ perceptions of support (Sommers et al., 2016).

TOK’s programs all include skill-building. Skill building comes in the form of academically focused activities, which are associated with high-quality after-school programs (Reisner, et al.2004). TOK’s program areas include an After School Center, Music School, City Sail, Summer Camp, and Brighter Day Counseling services. Tutoring programs specifically focus on academic skills. The arts-based programming, in music and drama, sailing, and college preparation build skills in other areas. Youth leadership is a key component of the organization’s approach and is embedded in the Teen Life Internship Program.

The programs are informed by the norms and principles and include the three factors in effective youth development programs including adult-youth relationships, skill development, and youth leadership (Lerner et al. 2014). Adult and youth relationships in the form of mentoring are a key component in reducing risk and in creating positive academic and career outcomes

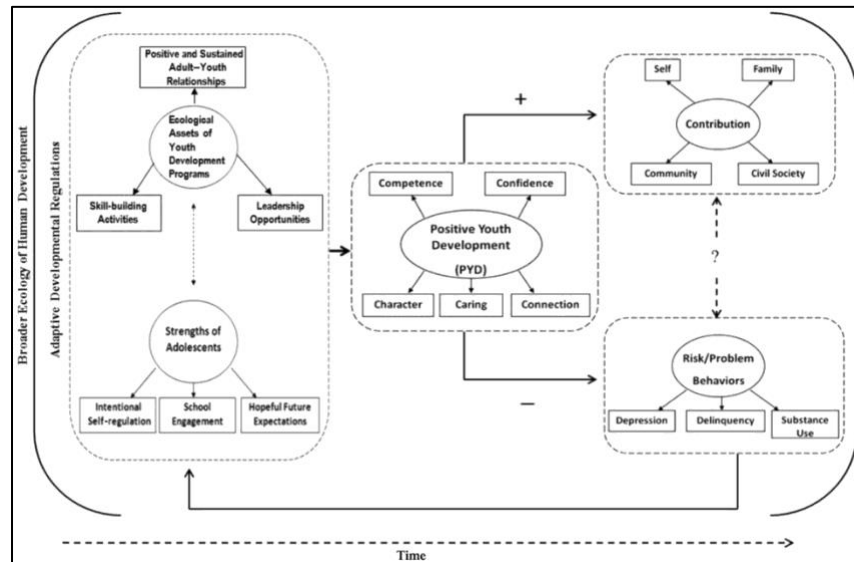


Figure 3: Lerner and Lerner Conception of Positive Youth Development

Ownership

Shift in ownership means that the culture becomes internalized throughout the organization (Coburn, 2003). It is not seen as an external initiative that requires buy-in by participants, but the participants own it and become the experts and generators of knowledge and growth.

The ownership dimension is impacted by the structure of the organization and the role of leadership. According to Peurach and Glazer (2012), organization replication is typically perceived as a process that moves from a local to a centralized model. They challenge this assumption and propose a knowledge-based collaborative model that facilitates local ownership. Founders lead non-profits differently than their successors not only in their personal competences, but also in their interactions with their boards (Block & Rosenberg, 2002). Stakeholders on all levels, including board, leadership, staff, families, and children will

all need to participate in ownership in order to make the move to a collaborative organization. The leadership and governance structure will inevitably impact the scaling process as a model for ownership.

Sustainability

Sustainability refers to the endurance of an initiative over time, after the initial push for implementation (Coburn, 2003). In order to be effective, change and growth needs to be sustained. Coburn links the individual classroom to the school and system and notes that there need to be “mechanisms in place at multiple levels of the system to support their efforts” (2003).

TOK’s non-profit status is a consideration in sustainability considerations. Westly et al. (2014) and Lyon and Fernandez (2012) identify multiple pathways to scale up non-profit organizations that are shaped by conditions, opportunities and barriers, and motivations for growth that are unique to non-profits. They describe the complexity of scaling up and identify varied models for success. According to Dees et al, (2004) while there is no one right way for a non-profit organization to accomplish successful scaling, the organization needs to define the innovation that is effective, whether it is its organizational model, program, or principles. They identify ways in which the impact can be spread and factors that should be included as leaders consider scaling, including readiness, receptivity, resources, risk, and returns.

Scaling Processes

Supporting these outcomes are scaling processes. Coburn’s four dimensions represent scaling outcomes. The outcomes are created through scaling processes, which include culture, program, leadership, and organizational structure. This is a recursive interaction, with processes informing outcomes and vice versa. Each process can impact multiple outcomes.

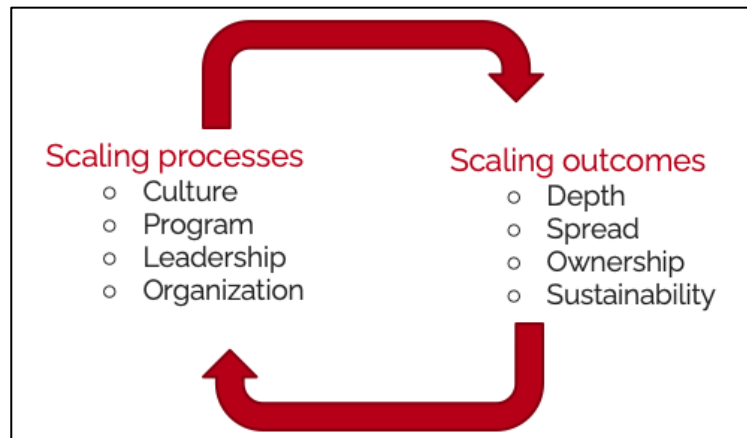


Figure 4: Scaling Processes and Outcomes

Snipes, et al. (2004) identify processes that support effective reforms in urban schools, including the role of leadership in creating a vision and in getting buy-in from stakeholders and consistent programming elements that include shared curriculum across sites and professional development to implement the curriculum. Data-driven decision-making and instruction are also key components for success. These elements are foundational for TOK’s culture, program, and leadership. My research will use Coburn’s four dimensions as a way to understand TOK’s scaling efforts to date and to make recommendations regarding future priorities.

VI. QUESTIONS AND PROJECT DESIGN

Questions

This project will use the following questions to guide the research and to inform the recommendations for the TOK leadership:

To what extent has TOK achieved depth, spread, ownership, and sustainability in its scaling efforts?

What are barriers and facilitators for TOK in achieving successful scaling?

Project design

Sampling strategy

The capstone project employs a mixed methods approach. The quantitative component uses a review of existing documents and data. The founder has used key performance indicators (KPIs) to track progress towards the short and long-term outcomes and to drive decision making since the inception of the organization. He utilizes a metrics tracking system, known internally as “The Deeper Dive.” This metrics system measures over 1,000 data points across four areas of organizational health including programming, fundraising, finance, and staff development. Site directors report their data to their board which reports it to the national team. The leadership team reviews this on a quarterly basis.

Using the quantitative data collected by the organization, those KPIs that are associated with indicators of successful replication including depth of implementation of the elements of the program, spread of key practices, ownership by leadership and program staff, and sustainability of resources were identified. Identifying these indicators will inform priorities for replication of program components.

The qualitative component of the project consists of individual interviews and focus groups. Interviews with key employees within the organization were conducted. The organization comprises a national office and five sites in three cities. There are 22 individuals on the leadership team: the national office has four; the original site has 12; the midwestern site has three; and another northeastern city has three. Interviews were conducted with three individuals in the national office, including the two co-founders, who also serve as the president and the

Scaling Dimension	Key Performance Indicators
Depth	Programming
Spread	Staff Care and Culture
Ownership	Programming
	Fundraising
Sustainability	Fundraising
	Finance
	Staff Care and Development

director of abuse prevention, and the chief advancement officer. Two interviews were conducted in the original site with the executive director and the associate director. Three interviews were conducted with other site directors who are providing leadership for the newer sites in various phases of development. These employees represent the senior leadership in the organization. The individuals include the founders, as well as employees with less than three years of experience with the organization, representing a range of tenure within the organization.

Three focus groups of staff members from the original site, another northeastern site, and midwestern site were conducted. Each focus group consisted of three or four individuals with 10 total participants. Their experience with the organization ranged from one to 18 years. These staff members are directly involved in program delivery on each site. Their participation was designed to ensure a boots-on-the-ground perspective.

Analytic approach

Interview and focus group questions were framed around the Coburn's four dimensions of successful scaling (Appendix C). Interviews and focus groups were conducted through Zoom. Interviews and focus groups were transcribed through Otter.ai and coded using a concept matrix that organized the comments into outcomes, consisting of depth, spread, ownership and sustainability and processes, including culture, leadership and organization, and barriers and challenges. Themes were identified within each of these areas. Examples included core values, youth leadership, relationally driven programming, pedagogical approach, communication, fundraising, and local context.

Existing organizational data was triangulated with interview and focus group information to answer the research questions. Components of, and barriers to, successful scaling for TOK were identified using the information.

VII. FINDINGS

Study Question 1: To what extent has TOK achieved depth, spread, ownership, and sustainability in its scaling efforts?

Question: Specifically, how has TOK achieved depth in its scaling efforts?

Finding: TOK shows depth through shared understanding of core values and the relationship-driven approach to youth empowerment among staff members across sites.

Beliefs

Coburn defines depth as that “change that goes beyond surface structures or procedures (such as changes in materials, classroom organization, or the addition of specific activities) to alter teachers’ beliefs, norms of social interaction, and pedagogical principles as enacted in the curriculum” (2003). The adults’ beliefs represent a key component of depth.

At TOK, the assumptions are captured in the tagline “Loving Kids for Change.” When asked what that tagline meant to them, every person interviewed discussed the importance of relationships with youth. The core belief is that relationally driven programming will bring whole-life transformation to kids. The founder explains, “We want to bring a change. We've just seen so many kids start out like this and then the systems of poverty and brokenness and despair just crush them. Their life story goes downhill. And we've seen other kids where it goes up. And so, the change we're talking about is the delta between the downward trajectory and the upward trajectory. And the way we get there is really through loving kids, but for us, it's a core value of relationally driven programs. So, we have highly structured programs and metrics. Every day of the week we're going to show up - we're going to be structured. But it's none of that that brings transformation, by itself. It has to be these loving relationships from adults who want to be in the lives of kids and see them become these agents of change.”

Leaders and staff in multiple sites described practical ways in which the tagline was evident. In an east coast focus group, one participant said, “‘Loving kids for change’ means that we need to view our students in a holistic way, where this is not just a job for them. It's so much more than that. It's an internship, but also, it's having that balance of being not only a supervisor, but a mentor, who is willing to go above and beyond to walk with students, whether it's helping them make sure they're registered for the right classes outside of here, or, helping them in their families get basic needs that they don't have. I'm thinking about walking along with students when they're going through crisis, but also just the importance of one-on-one conversations that we have with students, which are so critical. For instance, we have just had a conversation with a teen who is trying to figure out moving out of his home, because of things happening at home. And that's what I think makes that mission unique and really powerful. Whatever circumstances

teens are going through, we help to find resources to support them, and their families, as well as our elementary kids. And realize that, you know, this is more than working at McDonald's. We're here to really support every aspect of their life, physical, emotional, mental, and spiritual.”

The emphasis on relationships extends to the organization’s approach to discipline. One of the focus group members shared, “I think it's seen most in our approach to discipline. We are not punitive, like, ‘All right now you're gonna sit out for 15 minutes. Nobody's going to talk to you and you're going to be in isolation.’ Instead, it's, ‘Hey what's going on?’ I'm asking about their day; asking about what happened at school. It could be something that triggered them at school and they've just been having a rough day. It could be something happened at home, and you discover a mom and dad were arguing, and they didn't sleep, and cops showed up. It's not going to be judgment or harsh criticism but a place that they genuinely feel love.”

Every person interviewed identified the importance of relationships in bringing whole-life transformation to youth, and they provided a variety of evidence of the ways in which that occurs. Several leaders from multiple sites highlighted the importance of building relationships over time in order to develop trust. One leader noted, “We don't even hire seniors in high school, because we only get a year with them. While someone could say a year’s a pretty long time; it's not very long in the space of transformation. You really do need a longer time horizon. Time from people who care about you and who are invested is one of the major inputs there.” Another leader described the importance of time with students, “It's not going to happen fast. It will take a while to build that relationship with kids or teens, and that's actually good. Through that relationship, we're going to see them through some things. We're going to see them have accomplishments, we're going to build that relationship to where they know that they can depend on us. And then that's going to bring success”. Another said, “We are not providing one-off service. We're not just popping into kids’ lives for a second, but we want to be walking with them for a long period of time. We want to see whole-life transformation for all the kids that we interact with. That is messy. It's not as easy as just saying, ‘We handed out this mini backpack this year’ but it's, ‘We are gonna meet you where you are, and love you through whatever challenges are in your life or whatever comes your way. We want to be a part of your life for a long time and see you flourish in all these different aspects of your life’.”

The organization tracks the involvement of youth over time in several KPIs. One metric is the percentage of Teen Life Interns who were involved in the after-school program. Two of the newer sites had a goal of 10% for fiscal year 2020 and achieved rates of 16% and 14%. The oldest site had a goal of 25% and achieved 32%. The organization tracks after-school center growth and retention. Another metric is the retention rate of teen interns over a four-year period. Rates range from 0% to 50% across sites.

Several leaders also pointed out how the core belief in the importance of relationships is foundational to and evidenced in the programming model. One leader said, “I think more than anything, relationally driven programming has led to any real success. Anything else that works

is grounded in that. So, if we're offering SAT classes, or giving job feedback to teens, or offering music lessons, none of those things work unless teens feel a relational connection.” The long-term relationships with mentors provide a foundation of trust that allows youth to take the risks necessary for success.

Another leader described the importance of trusting relationships in the feedback cycle for students. He described the posture towards the students as, “Let's work hard to build relationships and build trust, because we're going to ask you to do really hard things - and we're going to give you good feedback - positive feedback and critical feedback and we need you to trust us in order to do that.’ A number of kids and teens that we work with haven't had very consistent figures in their life, necessarily. When we have a long-term relational approach, that's the other aspect of success.”

Relationships are built into the program model. Additionally, another theme that emerged in all of three of the focus groups was the importance of relationships in an organizational culture that extends beyond the scope of the formal program. One of the midwestern focus group participants described it as, “going the extra mile for kids, for teens, beyond our normal programming - if a teen calls me after hours, and they need my help, or they're stranded, or they might need some food or something like that. Just showing them that beyond, making sure that they can come here for music lessons on time, and clock in to work on time. Just showing them that I am available, to help them out with whatever they need outside of TOK. And then also just loving them through hard situations. So, if a teen gets fired, how do you still stay connected with that teen to ensure that they're okay, maybe encourage them to come back to the next job fair? That's what I think about when I hear, ‘Loving kids for change’.”

Core values

The organization holds five core values which support the mission and inform the norms of social interaction. They include: Journey with Christ, Red Guitar, Trusting Teens with Leadership, Relationally Driven Programming, and Make it Fun. The values were recently distilled, in a collaborative process, from a total of nine values to five at a leadership retreat held in January 2020.

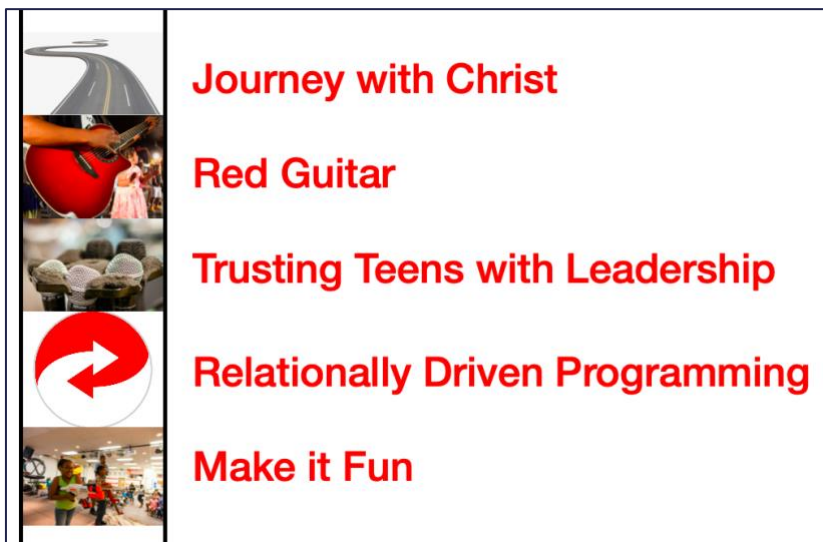


Figure 5: TOK Core Values

They are visible and explicit throughout the organization's publications, hiring processes, onboarding, and training. Every person who participated in an interview or focus group could recite them from memory and could provide further explanation of both the meaning of the value and ways in which that value was evident through multiple areas of the organization. The five core values, and the visual icons that represent them, are taught and implemented on all levels of the program. Images and stories are used extensively to reinforce the core values. To illustrate, "red guitar" and "dented mics" were referenced as core values in every interview and focus group. While that might require some explanation for an outsider, every interviewee could tell a version of the story that accompanied the value. The Relationally Driven Programming core value was most often referenced when participants were asked about the tagline and is discussed in the previous section.

TOK is a faith-based organization. The Christian faith is reflected in the Journey with Christ core value. One leader explained that this value provides a lens through which the adults view youth as, "as holistic human beings that are capable, are created by God in His image to have an impact in the world, in whatever way they can." Another leader pointed out that for the youth, "you don't need to be a Christian to be part of the organization because quite a few of our teens and definitely the kids that are there aren't. But we want to help introduce this Jesus that loves them."

Additionally, participants in all of the interviews and focus groups cited their faith as a motivating factor for working in the organization. Several appreciated the opportunity to align their personal values with the organizational values. One participant, who came from public education said, "I have worked in education for 15-16 years as a teacher and a consultant with New York City, and an assistant principal in New York City. Education has always been a lot to me. When I saw the connection that TOK was making between like education and faith, and just how it all came together I thought it was amazing and I wanted to be a part of it." Another leader, who joined the organization right out of college said, "My senior year of college I just looked it up and realized it was everything I was looking for in a job. I loved that it was Christian and very missional in its approach, and it was working with at-risk youth. It was music focused. It had a sailing program, and I knew how to sail. It was everything I wanted."

Spiritual development is also tracked on the Deeper Dive report. The percentage of teens participating in or completing a Bible study in fiscal year 2020 was targeted at 40% in three sites. The actual percentage of teens was 36% in a midwestern site and 83% and 0% in two northeastern sites.

The Red Guitar is a symbol of excellence. One leader described it as follows, "The red guitar is the story of excellence. Often well-meaning partners have offered us junky stuff, and said, 'Well it's just for the kids in the city, right? You can have this old used computer, or this old broken guitar, right?' We had this one donor who said, 'Here's this guitar, it's a \$1,000 guitar and it's

called the red guitar. Don't your kids deserve the very best?' and that became a symbol for what we want to do.”

Evidence of the commitment to excellence emerged in both the interviews and the focus groups. One leader noted that it generated a key question in the pandemic. He said, “When COVID hit, we all quarantined. How do we make sure programming is still red-guitar high-quality?”

Another leader described how excellence drives growth in programming and interacts with the relationally driven programming core value. He used the need of a family for childcare as an example, “On the face of it the very basic minimum requirement for an after-school center is that it's a safe place where my kid can spend a few hours after school until I get out of work. But for us it's that we do want to fulfill that need, with a level of excellence and care that welcomes families into a deeper relationship with us and exposes their youth to a variety of other services that are built around relationships.”



Figure 6: Excellence Core Value - The Red Guitar

The Trusting Teens with Leadership core value is symbolized by dented microphones. According to the founder, “Leadership development is symbolized by a pile of microphones that are dented. In every church I've ever been to in my life, you walk up to the stage, you pick up the microphone, and it's pristine perfect. At TOK if you walk up to the stage, it's gonna be a bunch of dented mics because it's not mainly the adults who are using them. Kids trip and they drop mics. We have a line item in every budget for new microphones. In everything we do, we trust teenagers to do it and through the process of giving them that trust and also letting them try out a



Figure 7: Trusting Teens Core Value: The Dented Mic

position of leadership that they begin to experience this transformation. They find their voice. They find out they have agency. They see themselves as something they never thought they could be.”

Leaders and focus group participants detailed ways in which the organization trusts teens with leadership responsibilities. Multiple leaders and focus group participants referenced the roles that teens play as teachers and mentors in the after-

school centers, as participants in the interview process for new staff and as the key drivers of the annual fundraising bash. Opportunities for youth leadership appear in a key component of TOK’s logic model and program is its Teen Life Internship program. It has detailed short-term, intermediate-term, and long-term outcomes (Appendix D). Not only are the teens mentored by the adults, but other programming is staffed by the mentored teens, turning them into mentors for younger children.

The last core value is Make it Fun. As one leader described it, “So everything in everything we do there's energy and brightly colored spaces. There's music and prizes and it's fun.” While every participant listed this core value, only two people elaborated on it. One leader discussed the way it was evident in fundraising events and another in the context of hiring decisions.

Programs

The pedagogical approach of TOK for youth supports the core values and is based on a model that has been developed by the organization called SLAM 40. The areas of focus include spiritual, leadership, academic, and musical, (SLAM) and the programs support those areas. The organization uses the Developmental Assets Survey to measure student growth and has set 40% as its target for Teen Life Interns who increased their number of developmental assets.

<p style="text-align: center;">SLAM 40</p> <p>Spiritual - Percent of teens reporting finding or growing their faith while at New City Kids</p> <p>Leadership - Number of teens who receive a workforce readiness certificate</p> <p>Academic - Percent of teens who matriculate into college</p> <p>Music - Number of Teens and Children who learned an instrument*</p> <p>40 - Percent of TLIs who increased their number of developmental assets</p>
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Figure 8: Pedagogical Principles - SLAM 40 Model

The individual sites adhere to programs that support all the areas of focus. Additionally, there are a few individual signature programs that are unique to some sites. For example, one of the northeast sites has access to a marina. At that site, the organization developed a sailing program in addition to the other programs that it offers.

Question: Specifically, how has TOK achieved spread in its scaling efforts?

Finding: The culture of caring and the relationship-driven approach to leadership development has spread to fundraising and has begun to spread to staff. However, some acknowledge that there is more work to do in the area of staff development.

Hiring, onboarding and professional development

Another theme that emerged in the interviews is the ways in which the organization achieves cultural spread through its hiring, onboarding and professional development. The core values support the mission and inform the norms of social interaction among adults and in the ways in which they learn. As one employee noted, “We're able to start incorporating the core values into things like recruiting staff. Are they relational? Are they real? Are they vulnerable? Are they opaque and not transparent? Are they fun? Are they deep? Do you want to go have lunch with them later? So, we're starting to filter things like that through the lens of our core values. And that is really helping us in a lot of ways because it eliminates a lot of other things. Because now you know if it meets the core values test or not.” Consistent with its core value of trusting teens with leadership, teenage interns typically will sit in on the panel as part of the interview process.

TOKs creates opportunities for professional development, meeting, communication and collaboration in several ways. It has just implemented a Leadership Academy, which is an internal organizational leadership pipeline. There is a leadership cohort that meets consistently. It also holds an annual summit for staff. This allows for employees to meet with others in similar roles from other sites and cities. One participant, who joined the organization within the last two years, described the summit, “Everybody looks forward to it. It's super fun. We definitely make it fun. And it's one of the best worship experiences you could ever go to. Because there's incredible musicians all over the place, leading worship every night. There's a lot of that culture building in the talks that are given. They're very well-thought-out talks. Conversations and meetings that work where they can actually sit face to face, from across east coast and Midwest to sit down and work on things.”

One of the focus group members talked about the value of the summit for her, particularly for cross-site collaboration. She said, “We just get a chance to hear again why we're all in this together and why we're doing this. But also, we get a chance to split into other groups. So, for example, I get a chance to meet with all the after-school center directors, from all sites. and other departments do that as well. Talking through how things are going and what has worked for us and what doesn't work--I think that helps.” Another group member added to her comments, “I completely agree with that. I think another huge factor has been having the TOK Academy, trying to get a majority of our adult staff to go through that. So that we are able to meet with each other and go through trainings together and learn from each other and ask questions in person, as well as visiting other sites, I think has been a really impactful thing to be able to see how, you

know, how are they teaching bring magic versus how we teach it? You know, what ideas can we take from them? What ideas can we share with them in terms of what's been successful?"

One focus group participant commented on how the core value of relationally driven programming with youth also extends to the staff culture. She noted, "Relationally-driven programming is really at the heart of what we do. It is all about relationships and impact on those relationships. It's about the relationships adults make with teens, and the way our team leadership team makes relationships with their peers."

While the leadership on the national and site levels appreciated the opportunities for growth, several people noted that this was not as evident for staff. One leader said, "How we train staff and how we ensure that they grow and move forward is an area where I think we've got some work to do. When do we train? Who does the training? How do we develop leaders? I'm very excited because I feel like we've started this Leadership Academy. And I think that that's where we're starting to get genuine momentum and create a shared language that everyone owns, versus the leaders tell you what we do and then you go and do it."

Another noted, "I think there's an element of the red guitar value that extends to staff development. It's been a challenge to kind of get these core values reflected all the way through so that like it's not just something we do programmatically, but it's really felt on the staff teams too. As I think about organizational health for TOK, there's definitely a lot of room to be able to live out these values in a much more pronounced way for ourselves. For our staff teams first, before we really expect our programs to reflect or teens to kind of espouse them too. I think we have room to grow there."

Culture of care

A culture of caring for staff also supports the norms of social interaction. The "Deeper Dive" dashboard tracks progress towards four organizational areas including fundraising, programming, finance and staff development and care. The staff development and care indicators include staff meetings, vision casting, onboarding, performance feedback, succession planning and culture. TOK's leadership is tracking staff development and care metrics on a quarterly basis to ensure a culture of care, which is one of the indicators of depth (Andre & Pache, 2016).

As an example, the self-evaluation survey from fiscal year 2018 in the second quarter shows strengths in the areas of vision casting, staff culture, and onboarding. Performance reviews at the site levels receive low scores, and staff pipelines and succession plans receive low scores on both the site and the national levels.

EMPLOYEE SELF-EVALUATION SURVEY		Midwest Site 1	Northeast Site 3	Northeast Site 1	Northeast Site 2	National	FY Avg/
Staff Meetings	Site wide staff meetings are regularly scheduled and completed.	10	9	8	10	8	9
	Staff Meetings are organized, communication is clear, and I consider them a very productive time.	9	7	8	9	8	8
Vision Casting	The Executive Director (ED) shares the WHY we are doing what we do.	9	8	9	10	9	9
	The ED brings a spirit of prayer to staff work and site programming.	10	7	9	9	9	9
Onboarding Process	Staff have gone through adequate on the job training.	8	7	8	8	9	8
	New staff receives team-specific training.	8	7	7	9	7	7
Performance Reviews	Each staff receives a written annual review.	7	6	8	5	10	8
	New staff receives a 3-6 month review.	3	6	5	3	10	6
	Each key staff person meets regularly with supervisor (2 hrs/month min.) to discuss to-do lists and job performance.	9	9	9	10	10	9
Staff Compensation	Staff pay is routinely reviewed to encourage retention of high-performing employees.	7	8	8	10	9	8
	Above and beyond performance is rewarded with a pay increase/bonus or other compensation based incentive.	9	6	7	9	8	7
Staff Pipelines & Succession Plan	There is an equipped person to take over each key role if someone leaves.	7	3	7	8	6	6
Staff Culture	The staff feel satisfied in their jobs, excited for the mission, and trusts their team.	10	8	8	9	9	8
Deeper Dive Culture	The entire org. chart is aligned on moving towards the targets articulated in the quarterly Deeper Dive Report.	9	8	8	9	9	8
Average Score (from each category total)		8	7	8	9	8	

Figure 9: Deeper Dive Self-Evaluation Survey FY2018/Q2

The culture of care for staff was also evident in interviews. Participants in two of the focus groups raised this as a key component of the organization’s culture. One participant said, “This is a place of common service, and ministry work, not just with the teens and the kids but even with our co-workers. We're really on this journey together and are empowering one another. Not just us empowering [teens] to take over and run the programs but even for ourselves - working with one another and empowering service. There's a lot of growth and a lot of learning about just being able to serve this community in the city.” Another participant described the culture as “human.” He said, “There's just an understanding that life happens. There's grace for as adults we have with one another and through each other.”

Several members of the program staff acknowledged the personal demands of the relationally driven program model, but also observed recent progress in ensuring stability in compensation and the addition of a retirement account. One person said, “Some of the pay stuff that's been happening recently has been really encouraging like a 401k plan. I know that as an adult staff, I am much more willing to lean in wholeheartedly, knowing that I have the support in my life around me, to be able to do my job well, and not worry about all the other stuff that I would worry about, like, where's my next rent payment coming from? I think it's important to make sure that the adult staff is well supported, mentally, physically, emotionally having all of those, those structures in place. That way we're willing and able, because I think we all come in willing, but sometimes it feels like we're not as able to give 100% just because of the weight of so much other stuff hanging over us. And I know in the past four or five years, there's been a shift towards making sure that we felt supported and that checking in and making sure that we have what we need, has been really important for me personally to be able to do my job more effectively.”

Fundraising

Another theme that emerged from the interviews was the ways in which the TOK's values extended into fundraising efforts. The annual fundraising bash is created and performed by program youth. According to the founder, "You're going to see something different than you see in any other fundraising events. They're fun. I've been to so many fundraisers and I'm like, are you kidding me? You're not letting the kids run the fundraiser. At the beginning of the fundraiser I'll say, 'Welcome. Thank you for coming.' Then, I'm handing the mic over to a kid and I walk offstage. The only thing I do for the rest of the night is play guitar in the background."

One of the focus group participants gave another example. As he was talking about planning a spring event, the donor wanted to get a committee together to do the work. The participant drew the donor toward the core values as part of the planning process. He said, "I stopped him, because that's when that value of trusting teens with leadership gets in. In planning, it shouldn't just be us, it should involve them as well. When they're a part of it they make it fun. The core values are checks and balances, whether it's an administrative thing, or whether it's a planning or whether it's executing. You're constantly going to and saying, 'Is there a teen that's involved so it's not just us?' and at the same time, 'Is it fun?' Each of those are pretty easy questions to answer - they're either at the table or they're not. And people are either bored out of their skulls, or they're having fun."

Another core value that emerged from a leader who was involved with fundraising was the value of relationships. He said, "Our goal in fundraising is to build a relationship with the people who want to partner with us and to see if we can make their giving dreams come true and be a blessing to them. And in the process, they can invest in something that's making a difference. It's about relationship."

Question: Specifically, how has TOK achieved sustainability in its scaling efforts?

Finding: Staffing and funding are the greatest challenges to sustainability in the scaling efforts. The leadership is creating mechanisms to address these challenges including the development of a leadership pipeline and a change in the funding model.

Staffing

There is a good deal of leadership turnover and that is creating challenges to sustainability on both the site and national levels. Individuals are involved in the organization because of a strong belief in the mission. However, the work with high-need children, youth, and families is demanding, and the core value of relationally driven programming comes at a cost. Site-level staff members described the demands of the work. One participant said, "Relationally driven programming has to be key because sometimes the hours aren't nine to five, 40 hours a week. Sometimes a teen at six o'clock is like, 'Hey, can I talk to you about the situation?' I want to leave and have dinner, or just have some quiet time, but that teen needs to talk at that moment."

It's not happening every week, every single day, but you have to be willing to be flexible and be there for students.”

Another focus group member, in a different site said, “There is this culture of innovation of highly creative staff, problem solving, or program creation and production. But then there's an unfortunate culture of burnout. We just burn the candle at both ends. When there's a high performing person, we just use them to the max. There are very minimal low seasons. What would have been low seasons, now because of COVID, we have been on this whole entire time, unfortunately. That is great in terms of productivity, but in terms of sustainability, it's not the most ideal situation.”

In addition to the demands on the site level, on the leadership level, the organizational culture requires an understanding of both site and national priorities. Several of the interviewees noted the complexity of the organizational culture. One leader identified the specificity of knowledge that seems to be required in order to be successful in leadership. He said, “Wanting someone to have extremely comprehensive knowledge of every system that TOK has is probably one of the biggest sustainability challenges. For better or worse, this might be inherent to the system that we have. Though I'm prone to think it's been more of an organizational choice. We have a lot of spots in the organization where we're asking people to have really specialized knowledge of pretty much everything in TOK, and to be able to do virtually anything. And it creates this paradigm of staff turnover becomes, especially for a small site, a really big hit. But we've seen that even in our national team, where we had two out of the six positions turnover, and we didn't replace them. And we didn't replace them with the same kind of function. It takes a system a while to recover from that. Because of the high context knowledge that we've said is required to be able to do anything within the TOK consistently.”

One theme that emerged was the impact of the turnover on efforts towards strategic goals while remaining personnel worked to fill the immediate needs created by the gap. One leader said, “Our strategic plan, in its form right now, calls geographic growth across multiple geographic regions, fitting five different criteria. If we move to a region, it's going to have certain criteria to do that. But you need to have leaders run those cities, you know, qualified people, that in particular would be great. If they already knew TOK, so it'd be nice to have internal leaders rising up through the ranks. So, a leadership development pipeline, either both external and internal to, prepare individuals to be ready for that and be called to do that.”

The unique motivating factors, the demanding environment of the work and the high expectations of the organizational culture have created sustainability challenges in staffing. Recognizing this, the organization has prioritized leadership development for existing staff through the Leadership Academy and the Leadership Cohort. Both leadership staff and site-level staff made positive comments about the introduction of both programs. One focus group participant reflected the others' comments when he said, “Leadership cohort is like a more regular summit in some ways. So, the sites get together so you can interact with the city that's

close to you, or we're on a video call with the Midwest site. It's encouraging to see that they're four states away and they still deal with the same issues of parents or kids or teens.”

Leadership Pipeline

Summary: Our #1 priority in scaling is creating a system for developing and deploying leaders.

Our greatest need and the focus of our expansion campaign for the next several years is to systematize efforts to hire, train, and deploy top level leadership staff faster, better, and in greater quantity. New City Kids has a team of committed leaders who “own” our current programs and sites. The training program will dovetail with existing job assignments to create an ever growing cadre of leaders receiving training in 5 critical areas: 1.) management and team building, 2.) fundraising, 3.) program execution and measurement, 4.) organizational development, and 5.) strategic thinking.

We are using a three-pronged approach to create the next set of these leaders to run our existing sites and launch the next ten:

1. We are providing management training for current leaders who serve as managers (many of them often being young themselves) in 12 key skills we've identified as top needs for managers with direct reports.
2. The Leadership Academy will train dozens of top-level leaders beginning in July 2018 with eight trainees in Cohort I.
3. We are focusing efforts on an entry-level pipeline to bring talent into the bottom of the pyramid and deepen the bench for current programs and future leadership talent.

Figure 10: Leadership Pipeline Priorities

Finance

Finances also create a challenge to sustainability. This theme emerged in two areas, the fundraising and the financial models. As a non-profit, the organization is heavily dependent on fundraising. According to its 2020 Annual Report, the organization had revenue of over \$3.7 million at the end of the last fiscal year. Eighty-five percent of that revenue came from events, foundations, individuals, churches, corporate gifts, and government grants, with only 15% from program services. The fundraising model is adapting to a multi-site, multi-city model as the

organization scales up. As one leader explained, “Our old fundraising model was not built for scaling. It was built to build a city, but not built to scale an organization. So, we've created a fundraising and donor engagement plan and model that preserves and protects the city level in relational fundraising. The onus is on the executive director and their team to do local fundraising really, but at the same provides for scalable fundraising beyond their own personal limits of capacity.”

Previously, fundraising was done at the city level, and the executive director of each site was responsible for it. In 2019, as part of the scaling efforts, the national

office created a chief advancement officer position. The individual in that role running the fundraising strategy for all the cities. Under the new model, the executive directors of each site meet with donors as part of the efforts, but the marketing, grant writing, recording and strategy efforts are led by the chief advancement officer. The interviewees who referenced this change responded positively to the additional support. As one leader explained, “So our financial model was built around the idea that everybody is a franchise basically, where they each function independently financially. So, their success rises and falls on the leaders, the leader and their team’s ability to manage budget well, raise money, and run the program really well. Which is

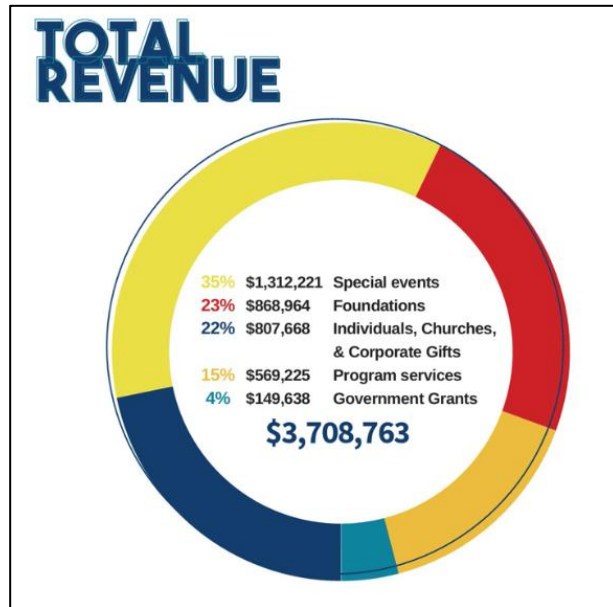


Figure 11: TOK 2020 Revenue

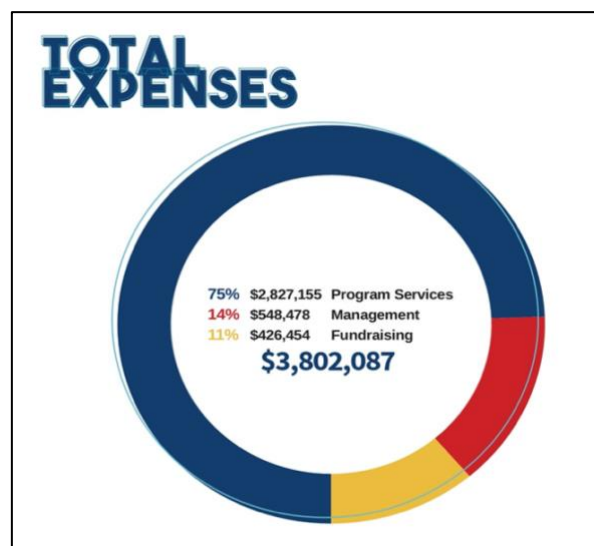


Figure 12: TOK 2020 Expenses

great because it puts the onus on the leader of the city. But it doesn't recognize that the Tall Oaks Kids is an organism. It's an entity that's beyond one individual city. So, we have changed our financial model. We are now what we always have been an organization that works together. Financially, we now have the freedom to do that.”

Question: Specifically, how has TOK achieved a shift in ownership in its scaling efforts?

Finding: A shift in ownership is emerging, as fundraising, finance, communication, human resources, and strategic planning become centralized allowing local sites to focus on programming.

Evolving

A shift in ownership occurs when both the knowledge and authority for change move to the site-based leaders and implementers. This includes shifting strategic decision making that is informed by deep knowledge (McLaughlin & Mitta, 2001; Stokes et al., 1997). Most interviewees identified the shift in ownership as an evolving process. Functions that previously resided in the site offices are in the process of being formalized and nationalized. These areas include fundraising, finance, communication, human resources and strategic planning.

Tensions between shared beliefs and programs and local autonomy

The founder has identified a strategy for the decision-making process. He calls it the “dotted line of minimal joy.” Most of the leadership team mentioned it during their interviews as a model that determined whether or not they could move forward with new programming. If each site is meeting their KPIs in each performance area at a certain level, they could proceed with new programming, as long as it did not detract from the existing SLAM core. However, several leaders discussed the tensions that exist when local leaders attempt to respond to emerging community needs that may differ from the SLAM priorities. One of the staff members discussed the need of the sites to have to respond locally. She said, “I think we need to be relevant to our community. Are we serving the needs of our community? Are we serving the needs of our families? Being able to listen to community partners and leaders is understanding the culture too. I think those are some things that we need to continuously, as I was, was mentioning, to be doing as is for us to be sustainable. Because if we maintain the same kind of perspective and then the community around is changing, then we're going to be irrelevant at some point. You know, in order to stay relevant, we need to stay on the pulse of what our community needs.”

One leader discussed the tension that the individual sites feel, as well as the steps that are being taken to address the tension. One leader provided an example. He said, “[One site] spent a lot of time in working groups thinking about how to restructure some of their programs and when they wanted to do that, they hit a lot of roadblocks in being able to implement that. There were questions. Where does the executive director’s responsibility and authority end? How do we prioritize programs? A lot of those questions came out of that process. Perhaps not only the high-level objectives are ingrained into what national is right now but the methods of how that's done. We're getting to a place where that's no longer the case but there wasn't a strong distinction between the how and the what.”

He went on to discuss ways in which this is being addressed, “So I think some of the things that we've done this year that will prove, I believe, to be really helpful here is that one of the kind of cross-functional cross-site teams that have been pulled together have been the primary program heads in the respective cities were to get working together with, with [the Executive Director] to work on our program model and create a logic model for the organization. The goal is to create three to five high level metrics that are the main metrics that our program is going to be pulling towards. And, you know, my hope is that when that is complete, then creates space for our local teams who are embedded in a local context the needs and the skills of their, their respective geographies, to be able to adapt programming towards those high-level metrics.”

We

While all the interviewees acknowledged that the shift in ownership is evolving, all of them used “we” and not “they” in their discussion. The use of the first-person plural reflects emerging internal ownership. It was not communicated as the responsibility of the national office to figure out, but was a process that they were all engaged in. As one interviewee noted, “I think there has been an evolving understanding of what a national organization looks like and then how you operate in your own city, and how leaders operate their own cities versus how it's happening nationally. I think that there's been a lot of movement in a positive direction. In owning the fact that like we're not autonomous units; we're not a franchise; or even more autonomously, we're not separate business units of a collective organization. But with that ownership has really come just like trying to figure out. How do you structure that? How do you lead that? What is necessary in that reality? I could have come up with my own strategic plan here in [local site], but I was not about to do that if at some point I was going to be contradicted by a national plan. But I really needed the boundaries of the national organization, I think to really help me understand how to proceed.” Most interviewees, while acknowledging the challenges, expressed an understanding of and desire to participate in the scaling process despite the current tensions.

Study Question 2: What are facilitators and barriers for TOK in achieving successful scaling?

Question: Specifically, what are the facilitators for TOK in achieving successful scaling?

Finding: The culture, leadership, and program are interactive components that facilitate successful scaling.

Leadership and Culture

When asked to choose three words that described the culture, participants generated the following words: high energy, more, fun, creative (2), passionate (2), learning (2), faith-based, musical, arts-centered, smart, diverse, dedicated, relational, driven, progressing, youth-focused,

connected, family, intentional, talented, concerned, committed, empowering (2), improving, passionate, hands-on, and human. Several themes emerged as facilitators of culture: leadership, education, communication, and collaboration.



Figure 13: TOK Culture Descriptors

The founder and executive director has provided leadership for the organization and identifies leadership as a key to creating and sustaining the culture. He said, “Leaders are the repeater of culture. You know, I can send it out from the top, and a later leader can turn that out from the top, but it's the great leaders in the program, who amplify those signals and send them out. The number one thing is great, great leaders.” Others in the organization identified the founder and executive director as the key factor in creating the culture. Other leaders identified leadership as a key in forming the culture and specifically mentioned the founders as culture creators. The comments of one leader reflected comments made by many others. He said, “Leadership makes a huge difference. [The founders] are big drivers on it. Their fingerprints are everywhere.”

Leadership development and education, both as a part of the onboarding process, and through ongoing opportunities through TOK’s University and Leadership Academy, was identified by multiple participants as a contributor to the organizational culture. One of the founders

Factors	Themes
What are the key factors in creating the culture?	
Founders	Leadership
TOK University	Education
Leadership Academy	
Annual summit	
Annual summit	Communication/collaboration
Weekly team meetings	
Collaboration across sites	

explained, “The biggest thing about Leadership Academy is creating a staffing pipeline. Usually, great staff are already on board, and what we wanted to do was create a system where we could develop them. So, we try and hire great people. But then there's all this potential for future leadership. They learn all of the elements of TOK’s mission, our core values and, and then we read all these great books together and it just begins. It's basically continuing education and leadership development within the organization for future site leaders, future after school center directors or directors. It is just introducing people to the history and the culture of [TOK] at the same time.”

Several of the focus group members identified the Leadership Academy and Cohort as important factors in creating the culture. One staff member described it, “I think another huge factor has been having the TOK Leadership Academy, trying to get a majority of our adult staff to go through that. So that we are able to meet with each other and go through training together and learn from each other and ask questions in person, as well as visiting other sites. I think it has been a really impactful thing to be able to see how, how are they teaching versus how we teach? What ideas can we take from them? What ideas can we share with them in terms of what's been successful?” In addition to the training, staff members identified the opportunities for communication and collaboration in the academy and cohort as important in building the culture by all the participants.

Program

TOK’s programming model is a facilitator in its scaling efforts. The programming is high quality and aligned with best practices and research in youth mentoring and after-school programs (Eby et al. 2008; DuBois et al. 2011; Reisner et al. 2004; Tolan et al. 2014). The mission, vision and core values are embedded throughout. And while the conceptualization of scale extends beyond the numerical growth in youth served and in new sites, the program is achieving success as measured by the KPIs and the number of students and communities served.

The Deeper Dive metrics tracking facilitates scaling. It serves as a quality improvement system. Smith et al. (2014) highlights the importance of evidence and high-quality standards in scaling after-school programming. Quality improvement systems use data to report on research-based quality standards. The KPIs allow the organization to measure quality and to ensure continuous improvement across sites. The national and site offices update and review the KPIs on a quarterly basis. The national and site leaders use them as a way to track progress towards organizational goals, to determine areas for improvement, and to adjust financial and staff resources to meet any emerging concerns.

Question: Specifically, what are the facilitators for TOK in achieving successful scaling?

Finding: The establishment of a national office has allowed the organization to centralize functions allowing for improved consistency and efficiency.

As the sites have multiplied, the leadership has worked to centralize functions in a national office in order to provide both consistency across sites and to produce greater efficiency. As one leader noted, “It’s become clear that as we increase the number of sites, we have to make the national support services more robust so first of all it can keep up with the demands of the sites, but also that we can leverage greater opportunities.”

The move to a national office was supported by leadership and staff members alike. The cited improvements in finance, fundraising, staff development, and external communication efforts. One staff member described it, “You have this national organization, officially called support

services. One, they're able to fundraise in a different way than [East Coast site] can, because we may say, 'We employ 80 or 100 teens, and we're working with 200 kids, a day in our after-school program.' Nationally, they can say, 'We have 200 teens in our program, and we are serving 550 kids.' Just the sheer number makes a big difference. They provide services that scaling wise just makes sense for one organization. For it to be in one place, rather than it to be all over so when it comes to bookkeeping and things like that it's much easier if it's done from one location. For example, when it comes to graphics or designing something for the website. It's much easier to have one person or a team that's in charge of that rather than each city trying to make their own thing that will have a lot of the same information. It can be done in a very professional way."

One of the leaders described the way in which the positive way in which the move toward centralization impacted the relationship between sites. He said, "I think we moved from decentralization towards more of an integrated system, where there are system linkages between the different business units. And there is more of a structural interdependence built into the system. There are some things that are really promising about that, and things that are kind of scary or challenging about moving towards that. But this is very much the direction that has been articulated over the past six to 12 months."

Question: Specifically, what are the barriers for TOK in achieving successful scaling?

Finding: Evolving and ambiguous organizational structures and systems present barriers for TOK at this stage of its scaling efforts.

Organizational relationships

While centralization is a facilitator in scaling efforts, there are some ongoing challenges as TOK implements change. When asked to describe the organizational relationship between the national and site offices, all the respondents indicated that this presents some tensions at this point in the organization's development. The relationship between the national office and site offices was described as evolving, changing, being defined, emerging, budding, work in progress, and not easy to define. There are several areas of tension as the organization grows. Themes emerged around organizational and technical systems and ownership and responsibility.

This need was reiterated throughout the interviews and focus groups in various ways. As the growth continues, the growing pains are felt differently at different levels of the organization. The founder said, "You want to make sure everything is happening the way it should be happening. No one's getting hurt and everyone's happy. Donors are happy. Kids and families are happy. You're always thinking about all that and as it grows, it gets harder, because you just are losing control. The systems aren't quite there yet to make sure that everything is the way it should be."

Organizational, technical and communication systems

Most of the participants referenced organizational, technical, and communication systems that were being adapted to meet the changing needs of the organization through the establishment of a national office in the Midwest. Organizational structures in the areas of fundraising, financial, human resource, and databases systems were identified as areas in which centralization of the functions has created improvements. However, interviewees also noted that there is still room for growth in these areas.

Several of the site leaders pointed out the importance of national leadership in ensuring that fidelity to the mission is maintained. One staff member identified a way in which this need is currently highlighted. She said, “I think the challenges that are facing us right now is we are in this kind of crucial and pivotal season that can change the trajectory of what TOK will be in the future. And if that isn't understood well or handled well it could turn into something else. I say that because right now you have three different cities and a fourth new one, that are all currently responding to COVID. Because the context of that is different in each state, and the communities are different, and each site right now is doing something different. So, if there isn't some national expectation that comes down the pipeline for respective cities as to what we do in terms of programming, in a couple of years we can all be doing something completely different.”

There are some systems that continue to evolve. One participant noted that organizational charts, positions, and programs were not aligned across sites. There remains ambiguity about where lines of accountability, authority, and responsibility lie within sites and to the national office. One leader described the how the tension appears and how it has been resolved in one site, “I was bringing together all of our program directors and essentially had become the referee between the, I wouldn't say competing priorities in the sense that there was an antagonistic relationship, but there certainly is a kind of there was a structural tension built in. The directors of those three programs were reporting to me and I was very committed to passing responsibility down to them. But what that really did is it created a little bit of a bottleneck for decisions. And it wasn't driving the kind of collaborative process that I wanted. I wanted to actually hand down accountability for the decisions. In many ways I was going to be accountable for what's happening on the high level. I was very comfortable with that. On a small level, I found that distracting. Some of the lateral relationships developed well, so we moved the following year to having the staff member who was the informal leader of that group of three became our program director.”

Along with the organizational systems, one focus group participant identified the need for system management for the technical systems to support greater efficiency, but also to hold organizational information, which can currently be dependent on one individual. The participant noted, “In the typical trend of nonprofits, they kind of learn as you grow, and create little things you know to help you kind of maintain data or you know to do attendance or whatnot. But now I think as we are scaling, both nationally and then city statewide and city wide at this point, there

needs to be some kind of integrated system operation system that manages our operations admin and logistics. Because someone's going to leave, and the fear is that when that person leaves so does all the information that they held. So, if we don't have an experience where they sit down with the next person and then transfer all of this information, there goes the answer to our previous problem and then that problem re-arises and now we have to find a new solution to that. Is there one system or software that we can use to house all that information? So, it then becomes foolproof as we change and swap people in and out of your organization, and essentially makes off boarding and onboarding a lot easier and more realistic for those who are coming in, so that the continuity of the program remains.”

One program leader noted the impact of inconsistent human resources policies and practices on the organizational culture. She said, “There are people thinking that the leadership was trying to hide things, not disclose them and I think in a lot of ways that's just because there were not consistent systems. People were doing hiring in different ways. There was a very inconsistent pace, pay scale and breakdown. It was not known, and so therefore I think there was a lot of mistrust. Time together to be able to cast a vision, and to be able to talk about the core and the systems that reflect them and back them up. I think that is what's needed to really set a strong, strong internal culture.”

The majority of leadership and staff highlighted communication as an ongoing challenge, but also identified improvements in communication as an unexpected benefit of the organization’s response to the pandemic. One leader, who joined the organization within the past few years, noted that when he arrived, daily, weekly, monthly, quarterly, and annual meetings were not part of the normal routine. The pattern has changed due to the needs of the past year. He said, “Now we are doing weekly leadership team meetings, and I know that each Executive Director meets weekly with their team, so there's some cascading content down. It's not coordinated super well yet like it should be. I worry about second, third, and fourth-year staff that aren't understanding changes. But where we cascade information down from the leadership team, or core value stuff or fun stuff or stories or prayer together, those are key elements of a weekly all-staff meeting.”

Another leader supported this point of view and explained, “Since January, we started meeting across cities. The first year I was here that rarely happened. So, [East Coast site] will look very different from [East Coast site] which will look very different from [Midwest site], and sometimes that's great, but sometimes if one site has this figured out, it would be kind of awesome if you just talked with them more to figure it out. We should just try to start aligning some of the things that we do so that everybody's not trying to recreate something. So, you’ve got to meet. I believe there need not be long meetings, but we've got to talk to each other. Gotta communicate.”

The improvement was noted by staff members, as well. One focus group member noted, “I appreciate more options we have for empathy, compassion and understanding. I didn't know that this is what inspired this other staff. We learn that about each other. Most people differ in the

way we view how to approach a problem, but because we've had more moments of connection and collaboration, it's just been a lot smoother, and we work well together. The times that we don't have those collaboration moments or those like meeting or fellowship moments that's when we see a lot of miscommunication—not trusting one another and not giving each other the benefit of the doubt.”

Ownership

While the depth, spread and commitment to TOK's mission, vision and values was clearly articulated by all participants, it was also clear that the evolving organizational systems have created some ambiguity in ownership of responsibility. While the “dotted line of minimal joy” concept provides some guidance, site leadership continues to feel the tension between organizational goals and their ability to respond to emerging community needs. One leader explained, “We are guided by our mission, values, program model, and budget. We have a lot of latitude in how we adapt. The practice, if not necessarily articulated, is that program structure is adapted to the challenges in the program that we're observing. It's high context and really hard to know what all the factors are to consider in making decisions. There's not been a hierarchy of articulated priorities for the organization. This staff wants to grow this program in this way, but how do I make this decision because everything seems to have some sort of meaning in the system? Even leadership staff who have been in a role for over a year say, ‘I'm not really sure how to even make this decision.’ Some of it is probably program structure and program model. Some of it is probably like an organizational identity locus like where a decision is supposed to be made that hasn't been clarified.”

Dede (2004) notes the challenges of adapting to a local environment and acknowledges the complexity of those adaptations. COVID-19 has magnified a hyperlocal environment, creating a situation where each site is in a different context based on the response of the local school district. New programs are developing as each site responds to the particular needs of its community. One leader raised the possibility that as the programs develop, they will continue to diverge from each other, depending on how long the crisis lasts.

VIII. RECOMMENDATIONS

Recommendation 1: Continue to centralize fundraising, finance, communication, human resources, and information systems while providing local autonomy in program development.

Everyone interviewed acknowledged the need for a national office in order to centralize functions for the sake of efficiency and consistency. They also acknowledged that the relationship is evolving as the organization scales up. A theme in both the interviews and focus groups was the desire for clearer organizational and technical systems. Ambiguity in some areas is creating frustration and leading to a lack of trust. Progress in centralization was noted in a couple areas including professional development and fundraising. TOK University was cited as an example of a system that provides consistent professional learning for new staff. Defining the roles and responsibilities of site and national staff for fundraising has also been well received. The organization should continue to prioritize centralized support and similar efforts in the areas of policy, human resources, information systems and external communication.

Site leaders and staff expressed a desire for more autonomy and less centralization in developing programming in order to respond to the needs of their local community. The attributes and outcomes of successful youth development programs that Lerner et al. (2014) and Fredericks et al. (2014) identify, are included in TOK's SLAM model. While music education is a core component of the model, the skill-building programming can be defined more broadly and could include a variety of skills. The organization should consider areas in addition to, or other than, music, in which programming could be developed on the local level. This would allow site-based leadership to utilize community assets and respond to community needs.

Recommendation 2: Identify and implement the minimal critical elements in the programming model.

While the programming model is successful, its complexity was referenced repeatedly and was cited as a contributing factor to staffing challenges and sustainability. Learning the organizational culture and practices takes time. Identifying, onboarding and training new staff in new sites will continue to be a challenge as the organization scales.

Dees et al. note that "In thinking about how to define their innovations, social entrepreneurs should keep in mind Bridgespan Group co-founder and managing partner Jeffrey L. Bradach's principle of 'minimum critical specification' - aim to define the fewest elements possible to produce the desired impact. They can then ask whether defining any other elements generally or specifically would promote smoother implementation in new places by providing more than the bare essentials. The goal is to find a level of detail that is most effectively transferable" (2004).

Recommendation 3: Refine and enhance internal communication practices both vertically, from the national office to the sites and vice versa, and horizontally, from site to site.

Create and enhance mechanisms for vertical communication and collaboration so that each site can be kept apprised of the activities of the national office. The national office should also solicit regular feedback from the local sites so that programming decisions can be informed by

the demands, constraints and opportunities present in each site's context. While all participants acknowledged growing pains in the emerging relationship between the national office and the sites, the site-level staff were almost exclusively concerned about programming decisions that are made on the national level without an understanding and consideration of the local context. Further definition of the minimum critical specification would allow the sites to respond to emerging threats and opportunities.

All of the site-based program leaders placed a high value on the opportunity to collaborate with other sites at the annual summit and through a leadership cohort. It was unclear what other opportunities or mechanisms exist that would support cross-site collaboration. In addition to the social and emotional support that the staff appreciated, formalized opportunities for regular communication and work would provide additional depth and spread of organizational culture and a means of sharing best practices in programming.

IX. CONCLUSION

The work has several limitations. Interviews and focus groups took place in the timespan between June 2020 and January 2021. The interviews with the leadership team took place after a January 2020 leadership summit in which the core values were collaboratively refined. Because of the timing of that work and the involvement of the individuals in the process, the core values were top of mind for those who were interviewed in June 2020, possibly resulting in an increased awareness of their impact on the operations of the organization. Additionally, throughout the process, the organization was in the midst of responding to the community needs presented by the COVID-19 global pandemic. The January 2021 focus group interviews were conducted with staff members in the midst of the operational challenges of the pandemic.

The participants represent another limitation. Interviews and focus groups were conducted with staff in senior or program leadership roles. Further work could include capturing the perspectives of other stakeholders in the program, including teaching staff, families, youth or community members. Feedback from these other stakeholder groups would provide additional insight into the spread, depth, ownership and sustainability of TOK's model.

TOK has created a successful youth development program in low-income neighborhoods. In its efforts to scale the work to impact more youth it has moved from a single city and single site to multiple cities and multiple sites. It is also in the process of refining centralized support structures through the establishment of a national office. The leadership recognizes the challenges that come with replicating and scaling a successful model to support strong and consistent culture, leadership, program, and organization across each location and is actively working to address emerging needs and opportunities.

This study used the lens of Coburn's (2003) conception of scale as a framework for examining TOK's growth to look beyond the number of students enrolled to answer questions about scaling outcomes in the areas of depth, spread, sustainability and ownership, and the scaling processes, in culture, program, leadership, and organization. The study found that TOK shows depth through shared understanding of core values and the relationship-driven approach to youth empowerment among staff members across sites. The culture of caring and the relationship-driven approach to leadership development has spread to staff experiences and fundraising efforts. The culture, program and leadership are interactive components that facilitate successful scaling.

Staffing and funding are the greatest challenges to sustainability in the scaling efforts. The leadership is creating mechanisms to address these challenges including the development of a leadership pipeline and a change in the funding model. A shift in ownership is emerging, as fundraising, finance, communication, human resources and strategic planning become centralized allowing local sites to focus on programming. Organizational structures and systems are developing and are currently presenting challenges for TOK at this stage of its scaling efforts. The establishment of a national office has allowed the organization to centralize functions allowing for improved consistency and efficiency. Evolving and ambiguous organizational structures and systems present barriers for TOK at this stage of its scaling efforts.

In order to address the challenges, the organization should continue to centralize fundraising, finance, communication, human resources, and information systems while providing local autonomy in program development. The organization should identify and replicate the minimal critical elements in the programming model. Internal communication practices should be enhanced, both vertically, from the national office to the sites and vice versa, and horizontally, from site to site to ensure the continuing breadth and depth of organizational culture.



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XI. APPENDICES

Appendix A: TOK Logic Model Detail

Inputs (Resources)	Program Areas	Outputs (Activities)	Outcomes	Short Term	Intermediate	Long Term
Funding: via donor community	Teen Life Internship	Children in music classes	Character			
Staff: highly competent and inspiring youth development professionals	After School Center	Children in tutoring sessions	Gain positive feelings about hard work, employment, and using skills to contribute to a team		x	x
Facilities: owned, donated, and rented	Music School	Children performing for community	Gain a posture of being willing to try new things (e.g., drama, music, public speaking, travel, camping, sailing, performing, college)		x	
Local teen potential (14-19 years old)	City Sail	Children in summer camp	Gain belief in cause and effect relationship that is necessary for basic delayed-gratification goal-setting skills			x
Staff, Children's energy, inspiration, and time (6-13 years old)	Summer Camp	Children in Brighter Day classes	Gain belief that society could work in my favor			x
Prayer	Brighter Day	Teens in Brighter Day support groups	Learn to give back: do something for free			x
Boards and other volunteers	(FFL)	Teens employed	Become adept at externalizing childhood or current traumatic experiences			x
Church supporters		Teens in SAT class	Gain information and insight around common psychoemotional issues faced by youth and young adults			x
Proven Models and Systems		Teens in life skills classes	Gain skills needed to manage the challenges of their environment			x
		Teens in mentoring relationships	Gain cross-cultural communication skills			x
		Teens receiving music instruction	Creativity			
		Teens in Bible studies	Learn an instrument		x	
		Teens in college readiness program	Master basic teaching skills		x	
		Families in college counseling	Learn curriculum design principles		x	
		Youth in sailing school	Discover unique blend of creative gifts by trying multiple artistic outlets	x		
		Youth in proactive abuse prevention and counseling	College			
		Teens on college tour	Change belief in the possibility of attending college	x	x	
		Youth on offsite retreats	Significant, measurable improvement on SAT score	x		
		Children in Bible studies	Design and complete a realistic financial plan to pay for college		x	
		Youth visiting workplaces	Graduate from high school			x
		(FFL activities)	Matriculate into college			x
			Christ			
			See the possibility that God exists			x
			Believe that God cares about me			x
			Experience the presence of God and taste spiritual power for your life			x
			Experience the incredible healing power of group/community			x
			Career			
			Learn how to interview	x		
			Learn time management skills that result in productivity			x
			Learn how to work in a team that is focused on a specific goal with import and deadlines			x
			Learn how to show up on time for a job, communicate with bosses	x		
			Learn how to receive critical feedback from adults	x		
			Receive a performance-based promotion	x		
			Gain exposure to 5 or more professional careers			x
			Learn how to speak in public in front of large group of adults	x		
			Learn vocal authority: the confidence to speak in a classroom setting in such a way as to command attention			x
			Take ownership of a classroom and gain a sense of personal agency			x
			Master classroom management skills		x	
			Achieve basic financial literacy		x	
			Learn to talk about family finances with parents		x	

Appendix B: Interview and Focus Group Questions

Outcomes

Depth

The organization's tagline is "loving kids for change". What does this mean to you?

What are the most effective strategies for accomplishing change?

What are Tall Oaks Kids' core values?

Spread

How do the core beliefs appear elsewhere in the organization?

For example, do they influence how you recruit, hire or do professional development for staff? How you do strategic planning? How you write and implement policy?

Ownership

What is the process for hiring, orienting and training new employees? Who is responsible for the process?

What is the organizational relationship between the national office and the site offices?

Sustainability

How has the organization adjusted its approach during your time with TOK?

What is needed to make this program sustainable at this site? To what extent do you think this program can be sustained?

Processes

Culture

What are three words you would use to describe the culture of the organization?

What are the key factors in creating the culture?

In what ways does the organization try to build a consistent culture across sites?

Leadership and Organization

If a site wanted to introduce a new program or make changes to an existing program, what steps would it need to take? Who would decide if a change could be implemented?

What structures are in place to support the various sites?

In what ways does the national organization hold sites accountable for particular components?

What type of evidence, if any, is examined to explore how sites are achieving their implementation and outcome goals?"

Barriers/challenges

What barriers and challenges do you see as the organization grows?

Appendix C: Teen Life Internship outcomes (Mason Grant)

The Teen Life Internship has tremendous qualitative short, medium and long-term outcomes in the lives of the high school students who participate. In what follows we will articulate these outcomes, and then share our system of benchmarking these outcomes in the following section.

Short Term Outcomes (within 12 months):

Teen Life Interns will: (1) Discover their unique blend of creative gifts by trying multiple artistic outlets; (2) Learn how to interview well; (3) Learn the life skills required to keep a job and communicate well with their supervisor; (4) Learn how to receive critical feedback from adults; (5) Learn how to speak in public in front of large group of children or adults.

Intermediate Term Outcomes (within 1-2 years)

Teen Life Interns will: (1) Gain a posture of being willing to try new things (e.g., drama, music, public speaking, travel, camping, sailing, performing, college); (2) Learn an instrument; (3) Master basic teaching skills; (4) Learn curriculum design principles; (5) adopt a positive posture towards the possibility of attending college; (6) Design and

complete a realistic financial plan to pay for college; (7) Master classroom management skills and gain a sense of personal agency; (8) Achieve basic financial literacy; (9) Learn to talk about family finances with parents.

Long Term Outcomes (within 2-4 years)

Teen Life Interns will: (1) Gain positive feelings about hard work, employment, and using skills to contribute to a team; (2) Gain a belief in the cause and effect relationship that is necessary for basic delayed gratification goal-setting skills; (3) Gain the belief that society could work in their favor; (4) Learn to give back: do something for free for someone else; (5) Become adept at externalizing childhood or current traumatic experiences; (6) Gain information and insight around common psycho-emotional issues faced by youth and young adults; (7) Gain skills needed to manage the challenges of their environment; (8) Gain cross-cultural communication skills; (9) Graduate from high school; (10) Matriculate into college; (12) Gain exposure to five or more professional careers.