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ABSTRACT

The Cumberland Valley Girl Scout Council is funded primarily by the United Way of Middle Tennessee. Approximately 5 years ago, the United Way of Middle Tennessee adopted an "outcome-based investment model" whereby agencies receive funding based on their ability to specify and monitor program outcomes based on genuine client and community need. To adapt to the new outcomes-based funding environment, the Cumberland Valley Girl Scout Council developed a monitoring and evaluation process to identify outcomes for youth development. The monitoring/evaluation process was based on an integrated quantitative-qualitative design that was intended to provide contextual information for guiding program decision making. The process was revised continually in response to the following: time constraints, evolving capacity of the organization's staff to monitor their own programs, and new information being learned about girls in the programs being evaluated. The outcome statements identified during the monitoring/evaluation process diverged from the language of the United Way outcome statements but did not differ from much of the research literature on youth development. The council's experience suggests that strategies designed to improve organizational learning must be revised continually through a process of monitoring and evaluation so as to respond to what has been learned. (Contains 10 references.) (MN)

Organizational Learning in the Nonprofit Sector: Lessons from Working with the Girl Scouts

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Abstract

In recent years, management experts, educators and human development specialists have been concerned with creating "learning organizations" (Senge, 1990) and "learning societies," (Keating, 1996), that is, human social institutions based on innovation and knowledge-building. This paper examines how one nonprofit organization attempts to become a learning organization as it adapts to a new funding process that requires greater attention to monitoring and to evaluation of program results. This organization's experience suggests that strategies designed to improve organizational learning must themselves be continually revised in order to respond to what is learned through the processes of monitoring and evaluation. Implications for how nonprofits might learn from such efforts and design effective monitoring and evaluation strategies are considered.

Learning Organizations and Learning Societies

In recent years the concept of "organizational learning" has become widely accepted as the basis for structuring businesses and private organizations for the future (see e.g. Chawla & Renesch, 1995; Marquardt, 1996; Senge, 1990). While the idea that groups of people organized about the completion of a task, the delivery of a service, or the creation of a product can learn as a group is hardly novel, the ascendancy of organizational learning as a construct that guides managers and workers in the 1990s is, indeed, new. The ascendancy is not just a response to changes in management research and trends in business literature but to a host of complex transformations in the workplace: the "down-sizing" of businesses and elimination of middle management; the decline of Taylorism (mass production) as a model for the design of organizations; the emergence of total quality management as a principle of organizational development; and rapid technological change that has transformed how knowledge and information is used in organizations.

At its root organizational learning is about the concept of creating and building knowledge within organizations (Hendry, 1996). According to Senge (1990),"the basic meaning of a 'learning organization' [describes] an organization that is continually expanding its capacity to create its future" (p. 14). It is generative, meaning that it "enhances our capacity to create" (Senge, 1990, p. 14). A learning organization does more than learn from experience; it continually reforms its processes and practices to realize more effectively the vision shared not just by managers but by all members of the organization.

Human development researchers have also been interested in examining the creation of "learning societies," to investigate how groups of people generate and build shared knowledge to advance key health and education projects. Like the growth of interest in organizational learning in business, the interest in developing social and educational institutions to promote a learning society emerges out of a particular set of socio-historical processes, including the rapid development of new technologies, the decline in fortunes of the poor and undereducated, and contemporary educational

reform practices (Keating, 1996). Schools and other public organizations dedicated to the promotion of human development have also had to respond to the change in the needs of the workforce, specifically, the need for a different kind of worker:

> The new economies may well depend on a much greater depth and breadth of population competence in order to function well. When limited skills were economically adequate, a high discard rate could be tolerated—economically, if not humanely. Failure to develop our human resources as fully as possible in the future, however, may hamper our potential to become a knowledge-based economy. (Keating, 1996, p. 12 of ms)

The inference Keating and others would have us draw is that education and other human development specialists must work to shape their organizations so that their own workers and the students they serve will become effective members of learning organizations. Those organizations that will survive in the twenty-first century economy, according to Keating (1996), will be those that learn how to promote innovation and build knowledge collaboratively in order to improve teaching and learning practice. They will be the organizations that recognize the "social nature" of knowledge and that develop structures for creating processes for making information available to shape and guide decision-making, thus creating a continuous movement from reflection to practice and back.

To be sure, not all educators agree that this new kind of learning society comprised of learning organizations is one we should seek to develop. Advocates of so-called "basic skills" approaches argue that creative problem-solving and teamwork are skills that should be taught after direct instruction in reading, writing and mathematics has been delivered. Other educational researchers have warned that there are built-in contradictions between the idea of promoting the development of free, creative problem-solving individuals who are prepared to accept willingly work in the twenty-first century workplace as defined by corporate elites.

Besides preparation for work there are many other goals of education and human development programs sought by social service workers, and the business-like

language of outcome-based investments masks these diverse goals. Moreover, creating a learning organization requires ongoing changes in the construction of the worker, the worker's roles in the organization, and the place of monitoring, reflection, and evaluation in decision-making. This shift, it might be warned, is difficult and must be accompanied by shifts in the monitoring and evaluative processes of outcome-based investments if those processes are to be useful in decision making.

These problems and challenges are ones I take up more focally in this paper, which explores how a nonprofit organization, the Cumberland Valley Girl Scout Council, takes on the challenge of becoming a "learning organization." The context of this particular agency's development is the organization's adaptation to a new funding process called outcome-based investments (described below) begun by the local United Way, the primary funder of the agency. I write as an evaluator of programs of the Girl Scout Council, someone who was hired to assist the organization with meeting requirements of the new funding process, a process that places much greater weight on monitoring and evaluation of program results than did past funding processes. My comments, then, are those of an insider and a beneficiary of the outcome-based investments process. My analysis is intended to guide the further development of this process as a fair, productive means of supporting organizational learning in the nonprofit sector in my community.

Outcome-based Investments As a Driver of Organizational Learning in Middle Tennessee

One of the key drivers of organizational learning in the nonprofit sector nationally in the last five years has been the decline in funding. Smaller pools of community, state, and federal resources mean that agencies are in greater competition for funding for services. Large private funding agencies have been forced to devise efficient and fair ways to allocate these shrinking funds and to respond to community members' desires to see more "results" from social services. One model that several communities have adopted is the "outcome-based investment model," whereby

agencies receive funding based on their ability to specify and monitor outcomes of programs based on genuine client and community need.

About five years ago the United Way of Middle Tennessee began investigating a shift toward just such a model as they allocated funds to community. While in the past agencies could often count on stable funding from United Way year after year, the funding agency was driven by economics and pressure from the community to investigate a way to allocate funds based more focally on outcomes, rather than on numbers of clients served, history of service in the community and organizational leadership. Over the past two years agencies have been asked to make the transition to having the vast majority of their United Way allocated funds be awarded through an outcome-based investment process.

Just to survive, the shift in funding has required most service providers to become "learning organizations" practicing the five disciplines Senge (1990) describes. Direct service workers have had to re-tool their own jobs to include program monitoring. The models of service delivery used in the past—whereby success was measured by numbers of clients served and the sense that one has done a good job—have had to be revised. Staff have had to pull together to clarify their vision of how clients would function better with their agency's services. And staff have had to rethink their relationship to their funding sources and to other agencies, pooling together to collaborate on projects they might have done on their own in the past.

Each of the key elements and terms of outcome-based investments is intended to direct service providers' proposals toward a particular view of those people who are being served, to the service provider, and to the funding agency. In fact, none of these latter terms (historically those associated with the nonprofit sector) is used to describe the key headings of a proposal. The developmental endpoints of clients or those being served are termed "outcomes;" those being served are called "customers"; services delivered are called "products,"; and the funders are called "investors." On the way to outcomes "customers" are expected to reach "milestones" or intermediate outcomes designed to help them reach "performance targets."

Central to the outcome-based investment program is monitoring and evaluation. In order to receive funding, an agency or collaboration must agree "to report milestones on a quarterly basis and participate in the evaluation process" (United Way of Middle Tennessee, 1996, p. iii). In addition, proposals are evaluated on the "strength and clarity of results," which must be defined in terms of changes in the behavior of customers (United Way of Middle Tennessee, 1996, p. iii). Funding lasts for two years and is contingent upon ongoing monitoring of milestones and products. The proposal requires that agencies identify specific areas of behavior change among customers and specify what evidence will be used to verify that the behavior change has been achieved through the program.

In order to ensure that the outcome-based investment process had buy-in from major providers in the area, United Way of Middle Tennessee created Councils for different service aras composed of service providers and community members. These Councils met to discuss and decide upon desired community outcomes in each service area, the kinds of services that would be funded, and some parameters for specific service areas. These groups met several times with United Way staff who provided the outline for proposals and training in the outcome-based investment application process to all interested agencies.

A central problem for United Way, however, has been buy-in to the monitoring and evaluation of programs. Agencies have struggled to learn how to define their program results and customer milestones in quantifiable terms. They have had to revise data collection processes and invent new forms for gathering information on clients. They have seen proposals denied funding for inadequate evaluation designs. To many direct service workers, this part of the process remains a mystery.

The field of service agencies that has emerged with funding from United Way is comprised of agencies that closely resemble the type of organization that Keating (1996) describes as "adaptable" to twenty-first century conditions—innovative and able to build knowledge about practice within the organization. Many agencies have seen their United Way funding fall, but others have been awarded more funds to implement programs with specific outcomes and monitoring processes established. While the

Cumberland Valley Girl Scout Council saw its own funding drop this year as a result of decisions of councils, from the inside it appears to be one of the more successful organizations in using evaluation to guide programming and so stands as a fairly representative adaptive learning organization.

Along the way, key issues have been raised in girls programming at the Council. For example, through the monitoring and evaluation processes, developmental outcomes that diverge from the United Way's agreed-upon ideal "outcomes" for youth development have been identified. Also through this process, an integrated quantitative-qualitative design, intended to provide rich, contextual information that could guide decision making for programs, had to be continually revised to adapt to time constraints, to the evolving capacity of staff to monitor their own programs, and to the new information being learned about girls in the programs being evaluated.

Divergent Developmental Outcomes for Girls: Perspectives of Girl Scouts' Staff and Volunteers

The Cumberland Valley Girl Scout Council, the organization with which I am primarily concerned here, was a part of the Youth Development area of the Strengthening Families Council. This Council was responsible for defining a set of outcome statements that agency proposals would need to address in order to receive funding under the outcome-based investment process. The outcome statements that this group defined were:

A community in which:

- all youth will have services that enable them to successfully complete [*sic*] high school or its equivalent and to be self-sufficient
- all youth are prepared and motivated to be contributors to their home, school, and community
- all youth will have positive and diverse role models
- all youth will believe in their own potential

- all youth will have the ability to make healthy life choices
- social and recreational opportunities are available to all youth (United Way of Middle Tennessee, 1996, p. 35)

These outcome statements suggest that agencies are to promote the development of youth as more free decision-makers who are adapted to mainstream institutions such as the school and involved in fun activities for their own sake. These goals are not different from much of the research literature on youth development (e.g., Dryfoos, 1990) and are well within the mainstream of expectations of youth named as part of national education and health goals in such documents as Healthy People 2000, Prevention Plus III and Goals 2000.

In the course of interviewing staff and volunteers of the Girl Scout Council about their own goals for girls, I found goals that diverged from the language of the United Way outcomes statements. Based on the premise that learning organizations share a common vision or goal (Senge, 1990), I wanted to know whether volunteers and staff described their activities with girls in terms of the current stated goals of the Girl Scout Council. These goals correspond closely with those of United Way's Strengthening Families Council: promoting girls' self esteem; helping girls learn values and ethics; teaching life skills, such as making healthy decisions; leadership; and service to the community.

I learned, however, that staff and volunteers have at least two other sets of understandings of ideal developmental outcomes for girls. One set of volunteer leaders and staff take primarily an "Adjustment" view of what Girl Scouts is. This view provides a more traditional interpretation of the United Way goals of what it means to "contribute" in terms of upholding traditional values of church, patriotism, and family loyalty. These leaders are likely to involve their girls in service activities such as visiting a veteran's cemetery or holding a flag ceremony. These activities underscore girls' obligation to respect their national heritage and to show loyalty to their country.

These same adults may also work to help girls to develop obedience to the authority of church and other community leaders. Their "success stories" for girls typically involve stories about girls who are initially rambunctious, disobedient, or

unruly and who gradually learn to listen to the adults in the troop. In this way, they take "adjustment" to the prevailing community and religious norms as the primary goal of Girl Scouting.

By contrast, other Girl Scout staff and volunteers see as one of their primary goals the widening of opportunities for girls. They take what I term a "Social Change" view of Scouting. The point for them is not to help girls adjust to a society that limits their opportunities in work and social life but to provide to girls opportunities that widen the circle of what they imagine is possible. Their view of Scouting is not just about serving the community but about changing it so that all girls have a better chance at succeeding at school, work, and play.

Staff and volunteers who adopt this view of Scouting may select activities for girls that are quite different from those adopting the "Adjustment" view. For example, during the first year I was evaluator, I observed troops who enacted a play written about the women's suffrage movement that culminated in the Tennessee Legislature's being the thirty-sixth state to ratify the amendment that resulted in giving women the right to vote. In addition, the Council sponsored a conference on education for girls and invited David Sadker, an educational researcher who has documented the ways that girls have been inequitably treated in our nation's public schools (Sadker & Sadker, 1994).

It is important to note that while these divisions were understood by some at the Council to have been present for some time, it is the monitoring and evaluation of outcomes that yield empirical support to the existence of these divergent developmental goals held by staff and volunteers at the Council. Moreover, these motivations appear to be central to how staff and volunteers understand their involvement in the Girl Scouts. In other words, it is more important for the Girl Scouts as a "learning organization" to understand how staff and volunteers orient themselves with respect to this developmental difference (Adjustment View versus Social Change View) than simply to whether or not they understand the Council's five goals or the United Way's outcome statements.

Neither the Council's nor the United Way's "official" documents capture what motivates adult participants in Scouts. For the Girl Scouts to continue to develop as a learning organization, it is critical for staff and volunteers to examine more closely the actual models that they use to guide their programming decisions for girls. More generally, organizational learning in the outcome-based investment process may require "thinking outside the box" of the stated program outcomes to ask the questions: What do those implementing our programs really believe about the services they are providing? What motivational differences exist across the organization for delivering services? And finally, do those differences need to be reconciled, or can they exist in harmony as the organization continues to learn how to improve its service to clients in a way that is based on agreed-upon elements of a shared vision?

Adapting Monitoring and Evaluation to Meet Evolving Program Needs

One additional development within the monitoring and evaluation processes of outcome-based investment is the need to revise continually the research process to meet the emerging needs of programs for decision-making. Over the course of the past two years, as an evaluator I moved from a labor-intensive quantitative-qualitative design of troop and adventure programming to a quantitative design with frequent monitoring of results and mini-studies to examine more closely relationships in the quantitative data. This latter design, I argue here, is one that is the most feasible for other nonprofits that seek to integrate data and information into program decision making at a low cost to the organization. It is, however, not the "final" answer to the problems of monitoring and evaluating programs; rather, monitoring and evaluation processes themselves must undergo continuous improvement and learning as an integral part of nonprofits becoming learning organizations.

My evaluation work began two years ago and initially focused on two different types of Girl Scout programming. The first evaluation project focused on the troop experience for girls. My task was to describe the developmental processes of troop activities and to evaluate their effectiveness with respect to the five goals of the Council

(improving self-esteem, teaching ethics/values, teaching life skills, promoting leadership, and providing opportunities for service). In the second project I was asked to evaluate the effectiveness of a school-based program called Girls High Adventure (GHA). GHA was designed for "at-risk" girls in middle school and included a self-exploration curriculum that culminated in a weekend with adults that involved outdoor challenges and opportunities such as a ropes course, horseback riding and camping.

My design for both projects included a mix of quantitatively-based surveys and qualitative observations and interviews designed to provide rich, contextual information about program success (or failure) and what might be contributing to it. My assumption, with that of Keating (1996), is that developmental data for decision-making must be sufficiently rich and detailed so it can speak to speak not only to the *what* of development but more importantly to the *how* of development. My troop evaluation, therefore, involved numerous observations at four distinct troop environments—a rural area, a wealthy suburb, a middle class suburb, and an inner city area. The observations and discussions with girls and troop leaders there were intended to provide an account of the diversity of activities, goals, and effects of troop participation for the adult and girl participants. Similarly, the evaluation of GHA initially involved periodic observations of the classroom experiences of girls, review of journal entries of girls in the program and interviews with participants about their experience. Both program evaluations used quantitative data primarily to supplement the information being generated by the qualitative report.

I provided the Executive Director and the Assistant Director with monthly summaries of findings and short papers detailing what I was learning in the troop settings and in GHA. From time to time these formed the basis of discussion for staff about proposed changes in the programs, and preliminary quantitative data were used by the staff grant writer to prepare the upcoming year's outcome-based investment application. A final report on troop effectiveness and on GHA was produced in the summer after the first year.

In the long run, this first year's design proved to be less than feasible. First, as a part time consultant, I found it nearly impossible to attend enough meetings of troops for a sufficiently wide variety of types of troops to develop a deep understanding of the learning processes of troops. Second, I believe that the design I used was not well understood by all the troops themselves, and it was not clear to me that they benefited from the process of being the participants in the evaluative process. Third, the Council needed more quantitative data to support its claims as to troop effectiveness for funders such as United Way. There were too few girls at the same age level with similar demographic backgrounds in the to make any claims about the effectiveness of Scouts.

During the second year I have revised this process considerably, both to meet the needs of the Council for assessing troop effectiveness and to provide timely, contextual information for a more limited array of questions. Currently, I use the much larger database of students from the GHA program to assess the difference on a range of program outcomes between girls in GHA who have previously been a part of a Girl Scout troop and those who have not. These data have pointed out that on the whole, girls in the program who have had Scouts have slightly higher self-efficacy and have significantly higher connections to prosocial adults and activities (such as community service) than do their peers who have never been in Scouts.

In addition, through an analysis of survey data on expectations of the future, I found that girls from a private school had much more developed notions of their future career paths than did a comparable sample of public school students. This finding has led to discussions of how to integrate career information into the GHA curriculum and to a more in-depth study of girls' conceptions of their future and how they intend to reach their long term goals.

For a number of reasons, this year's design has proven more feasible and more productive from the researcher's point of view. First, it is more cost-effective than the extensive qualitative troop design. It requires much less time spent traveling from troop to troop and in transforming qualitative observations into coherent narratives of development. Second, the design meshes well with staff's increased capacity to monitor and evaluate their own results more effectively. More staff currently

understand the outcome-based investment process, and in the GHA program, training in data collection by the program manager is integrated each semester into volunteer training for mentors. Finally, the design allows for flexible adaptation of the evaluation process to address gaps in data and gather more contextual information on aspects of girls' development as those needs arise.

Concluding Comments: The Future of Outcome-based Investments

Outcome-based investments remains a controversial process in the Nashville area despite its community-wide implementation by a major funder. Many agencies have seen their funding drop significantly, and they are disappointed in the cutbacks in services they have had to make. A few agencies, like the Girl Scouts, have adapted fairly well to the changes, but still struggle to find new ways to thrive in the funding climate of the late 1990s. What, then, will enable the outcome-based investment process to be a positive catalyst for creating learning organizations in the nonprofit sector?

I believe that the lessons from the Girl Scouts are instructive here. First, it is critical that organizations be able to make sense of "outcomes" along a diversity of developmental pathways. For some, being a service worker means living out one's most deeply-held religious values, while for others, it is a means of promoting community change. For only a few is service an opportunity to engineer mechanistically the new twenty-first century worker. For service workers to buy in to outcome-based investments, the process must acknowledge these motivations for service and to make room for a variety of developmental goals. The inclusiveness of the process of defining outcomes ensures that the United Way's process is likely to continue to evolve toward this goal, but facilitators will need to be sensitive to the variety of goals in the community, even when those stakeholders are not represented in the decision-making representatives.

Second, the outcome-based investment process will need to take much greater care to devise ways to assist agencies and organization with monitoring and evaluating

programs. Few organizations currently have the capacity internally to conduct their own program evaluations; those that do must do so at as low a cost as possible, so funds are not diverted from programming. An outcome-based investment process and the re-structuring of the nonprofit workplace it implies requires that direct service workers themselves be involved in monitoring and evaluation. Specific supports and resources must be devoted to helping such workers define their own roles and interests in the process. It is essential to provide training in how to use the data and information gathered so programs can have ongoing feedback about their program's success.

The outcome-based investment process is neither a panacea nor an isolated strategy. As a driver of organizational learning, it has the potential to transform how a community provides services to its citizens, but only insofar as the process itself is a learning process—one that adapts to the changing needs of the community and those in it. In short, "organizational learning" is not itself a fixed concept, but one that must evolve as processes designed to promote creativity, knowledge-building and innovation in organization change the very contexts of organizational practice.

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