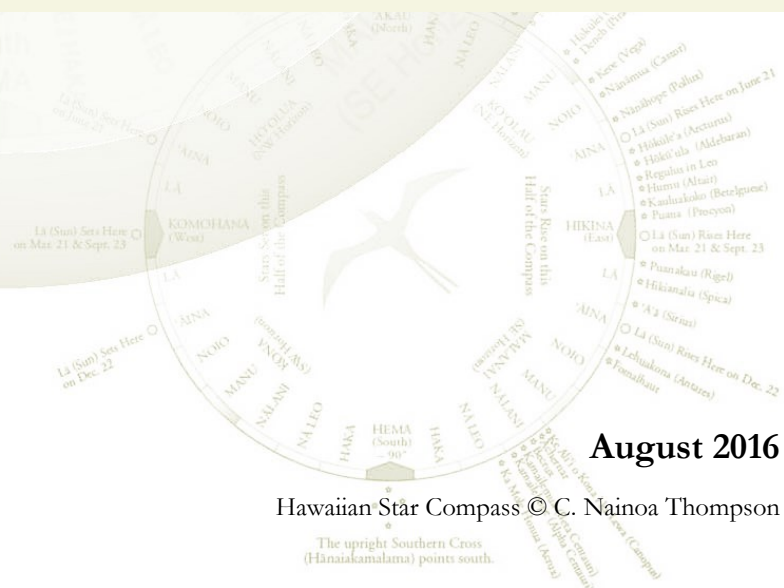




Photo provided by Hau'oli Mau Loa Foundation

Hope for Kids 'Ekahi Reflections

Five Key Insights Into Our Work With and Among Partners



August 2016

Hawaiian Star Compass © C. Nainoa Thompson

The upright Southern Cross (Hānaikamalama) points south.

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Overview

This paper is a distillation of the insights Hau‘oli Mau Loa Foundation gained over the first six years – the initial phase – of its Hope for Kids Initiative. Rather than focus on lessons learned in the content area of the Initiative, which is documented in other places, this paper outlines five key insights related to the nature of the Foundation’s relationship with its grantees (Partners); how relationships across Partners was supported and how the Initiative was structured. These insights are that

- ◇ **Establishing a flexible, trusting partnership with Partners is powerful.**
- ◇ **Multiyear, flexible funding is highly valuable.**
- ◇ **Peer learning among Partners is also highly valuable.**
- ◇ **Finding effective yet respectful ways to evaluate Partners’ work is challenging and requires continuing efforts.**
- ◇ **Helping strengthen the capacity of Partner organizations is an ongoing challenge.**



Introduction

It was 2008 and Hau‘oli Mau Loa Foundation was entering a new phase in its development. We had just received full funding from our Benefactor and hired our first staff members. A mission and set of values had been crafted, and the board and staff were trying to figure out what to do with the part of our mission that said, “In Partnership with others ... bring hope to those less fortunate, especially children....”

We hired Joann Farnsworth, a longtime children’s advocate in Hawai‘i, to compile secondary data on how Hawai‘i’s kids were doing. In addition to pulling the data together, she shared what she uncovered with leaders known for their work with kids and asked them, “What does this data mean to you and how might the Foundation have an impact with its relatively small amount of funds?” She then succinctly summarized what she had learned: *“Seventy-five percent of the people we interviewed said our kids aren’t feeling very hopeful about their future.”* Farnsworth concluded from what she had heard that this gloomy assessment was based on an uncertain economic future and a school system that left children unprepared in both skills and self-concept. Her report to us said, “According to key informants, schools are not creating a love for learning – only a proficiency at test taking.”

Farnsworth’s report coincided with some thinking we were doing at the time about how our interest in environmental issues (another part of our mission) might intersect with our work on behalf of children.

Based on Farnsworth’s research, our mission, and the board’s discussions with staff, we developed the Hope for Kids Theory of Change. The theory posits, in essence, that kids will be more hopeful about their future if several conditions are met:

- They have successful learning experiences doing things in the outdoors and developing skills important for life...
- In the company of a caring adult who sets high expectations and helps them understand and celebrate their culture.

The Great Recession following the September 2008 Lehman Brothers bankruptcy left us fearing that even a very structured request for Hope for Kids proposals would result in our having to deny too many good ones. Since we had already determined that we could work with no more than 10 Partners (grantees) on the Initiative, our board and staff agreed that rather than issue an RFP, we would invite 10 organizations selected from a pool of nearly 60 nonprofits that key stakeholders had identified for us as having the potential to deliver.

Of the 10 organizations we approached, nine accepted our invitation. We visited their locations to learn more about their work and share what we wished the Hope for Kids Initiative would accomplish. The visits went well and we invited the organizations to partner with us in launching Hope for Kids over an initial three-year period. That was in January 2009.

The nine Hope for Kids Partners received our funding to begin work in June 2009. The Initiative was later extended to six years, being formally completed with 10 Partners on May 30, 2015. (The 10th Partner was added at the beginning of the fourth year in June 2012.) As we plan to launch the second phase of Hope for Kids, we now refer to those original 10 Partners and that first phase of work as Hope for Kids ‘Ekahi (One). The follow-on phase is Hope for Kids ‘Elua (Two).

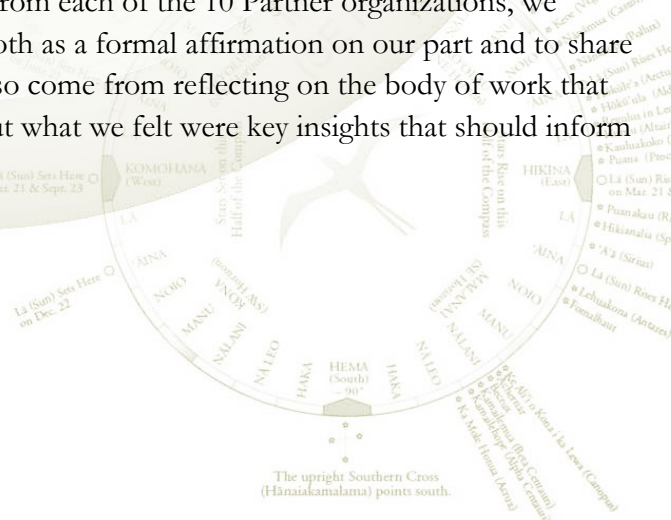
We recognize the Initiative is a reflection of the choices we made – everything from duration and amount of funding to which Partners we would engage. Those choices color how the Initiative unfolded and the results we saw. They closed some doors, opened others and contributed to the lessons we learned.

We learned a lot about what we now understand to be the primary focus of Hope for Kids ‘Ekahi, which is ‘āina-based education. Defined by Dr. Brandon Ledward, “*‘āina-based learning is teaching and learning through ‘āina so our people, communities, and lands thrive. ‘Āina refers to the land, sea, and air—all that feeds and sustains us.*”

Much of what we learned about ‘āina-based education is wonderfully expressed in a series of videos produced by Palikū Documentary Films (available at <http://hauolimauloa.org/program/hope-for-kids/>). Through written surveys and small-group interviews conducted by Pacific Resources for Education and Learning (PREL) in a two-year evaluation of the Hope for Kids ‘Ekahi initiative, we also heard how the programs improved the lives of the program participants and their ‘ohana (families); what they valued about the programs; how the programs connected them more deeply to their communities, to the ‘āina and to each other; what important skills they learned; and what they learned about themselves. (PREL’s evaluation findings are available at <http://hauolimauloa.org/hope-for-kids-executive-summary-and-evaluation-report-prel-august-2015/>.)



This paper is not a distillation of what we learned about the content area of the Hope for Kids Initiative, but rather a reflection of other insights we gained over the six years. With the help of consultant Miki Lee of Leeway Enterprises, who interviewed and solicited written feedback from each of the 10 Partner organizations, we identified five lessons important enough to document here both as a formal affirmation on our part and to share with others who may be interested. The ideas in this paper also come from reflecting on the body of work that the Foundation developed over those six years and teasing out what we felt were key insights that should inform our future efforts.



Engaging with Partners

The Implications of How We Engaged with Partner Organizations

Another Partner, reflecting on the years of Hope for Kids, urged us to recognize the value of the Foundation as a peer in the process. She said, “It was important and valuable to co-learn with the Foundation, not just be facilitated and evaluated by a funder.”



Photo provided by 'Aha Pūnana Leo

The issue of the power dynamic between funders and grantees is well documented. Our decision to invite organizations to partner rather than soliciting proposals, coupled with our following our Benefactor's practice of getting to know people and engaging with them, rather than just writing a check and walking away, set the stage for an important and positive dynamic that developed over the course of the six years.

One Partner described the relationship that developed over time between his organization and the Foundation as follows: "I would stress even more the (role of)

involvement of the Foundation in being part of the work of the partners. Involvement that does not stop when the 'grant' was over but continues. (This role) has helped me to understand that even the 'work' that we do with our community is not to have a program but to create relationship. The Foundation, because of its approach, is not just *Hope for Kids*, but has become Hope for All Of Us, personally."

Another Partner, reflecting on the years of Hope for Kids, urged us to recognize the value of the Foundation as a peer in the process. She said, "It was important and valuable to co-learn with the Foundation, not just be facilitated and evaluated by a funder."

In her report to the Foundation, Miki Lee summarized what she heard from Partners as follows:

Early site visits (pre-invitation) by the Foundation to physically see and understand the program and its work and to personally meet staff demonstrated very early on a commitment to knowing an organization. Partners felt the visits from the Foundation allowed them to tell their story in an authentic way.

Partners felt honored and respected by being invited to participate in the Initiative. They recognized the care and attention invested in identifying potential partners. Knowing they were one of a few carefully considered partner organizations was deemed a compliment to their work. It also established early partner commitment to take seriously the investment made in them.

The grantor-grantee relationship is based on, what feels like, unconditional trust by the Foundation staff and board. There is trust in each organization's individual knowledge and understanding of the community being served, and their ability to succeed. Partners believe the Foundation accepts and supports that the Partners' approaches may vary, that the organization is best qualified to define its goals and outcomes, and that the organization's path and needs may change over time.

Partners are deeply and positively affected by the sincere, caring relationship with Foundation staff and board. Hau'oli Mau Loa's practice of being proactively involved, curious, being available when called upon, caring about the people, not just the program, along with making frequent site visits, not to check-up on an organization but to check-in and "get in the mud" [were each noted as specific examples by Partners]. The Foundation's willingness to help connect organizations with other resources was also viewed as helpful. Partners believe this supportive relationship with Hau'oli Mau Loa will continue into the future.

This level of deep engagement and trust took time and resources – both from the Partner organizations and the Foundation. The kind of relationship Partners noted did not develop immediately. Sometimes the Foundation struggled to achieve the type of connections noted in Lee's report. We are sure that in some cases the Partners felt the same.

Funding

The Value of Multiyear, Flexible Funding

We heard from many Partners that the commitment of multiyear funding gave them a sense of certainty in an often uncertain and changing environment. There is a tremendous amount of stress related to year-by-year fundraising, which makes financial management of a nonprofit especially difficult.

The Hope for Kids ‘Ekahi initiative covered six years, from June 2009 through May 2015 in two three-year phases. Nine Partners took part in all six years and a 10th Partner was recruited for years four through six. The 10th Partner has a level of experience that made it relatively easy to segue into the cohort with the other Partners, but in hindsight it felt to the Foundation as though the 10th Partner never had quite the same opportunities to fully experience the Initiative as the first nine. Something we learned over the course of the Initiative is to maintain a consistent cohort, if possible, over the duration of the project.

From Lee’s summary: *Partners appreciated the six-year grant period, citing numerous benefits, including the ability to stabilize internally, build capacity, and secure matching funds. The six-year grant term acknowledged the time necessary to effect true change and impact – both organizationally/ internally and programmatically. The user-friendly application process, specifically, that it was not an intensive annual process, allowed more time for program work.*

We heard from many Partners that the commitment of multiyear funding gave them a sense of certainty in an often uncertain and changing environment. There is a tremendous amount of stress related to year-by-year fundraising, which makes financial management of a nonprofit especially difficult. Providing multiyear support helps mitigate this stress somewhat and enables nonprofits to really plan, execute and fine-tune programming, as well as to work on organizational capacity.

We also believe that multiyear funding can somewhat allay Partners’ potential concerns about expressing challenges to a funder. When the immediate concern that funding might not be renewed is taken away, candid exchange, including the sharing of problems or challenges, is more likely to occur.

We often heard about the value of flexible funding from the Partners. The usefulness of flexible funding makes sense, given the many uncertainties in the nonprofit sector.

Also from Lee’s report: *Administration of the grant is stress-free. Partners believe the Hope for Kids grant to be one of the most fluid, organic, and satisfying grant experiences they have experienced. User-friendly reporting, flexible due dates, freedom to determine where to direct and use funds, and the ability to modify the terms of the grant along the way were mentioned. The ability to use grant funds to build capacity, hire staff or improve facilities is considered a rare yet invaluable element of Hope for Kids support, helping several organizations solidify their operation.*



Photo provided by Hau‘oli Mau Loa Foundation

The upright Southern Cross (Hinaiakamalama) points south.

Peer Learning

The Value of Peer Learning Among Partners

A long-time staff member from a Partner organization reported reaching a breaking point at her organization and decided she would quit. Not until she called a staff member from another Partner did she begin to see alternatives. She later told a Foundation staff member that she would never have thought of reaching out to peers like this had it not been for the Hope for Kids Initiative.

In bringing together a cohort of Partners working in a similar field but in distinct communities, we had an idea that there might be learning across the group but we really did not understand how best to facilitate it or what forms it would take. We initially convened the Partners for a half-day session at one of the Partner's sites to explore if and how they wanted to work together in the future. While in comparison to future joint gatherings (we held nine over the course of the six years), this one was only moderately successful, there was overwhelming agreement that Partners wanted to get to know each other better and learn from each other.

After each of these nine gatherings we asked for feedback. Following are some of the most frequently heard comments about the value of these gatherings:

- Having an opportunity to learn, share, network, reflect and deepen connections with other Partners.
- Having a chance to inspire and be inspired by the places and the people.
- Joy, inspiration, confirmation that the work we're all doing is of utmost importance.
- Having the opportunity to meet with the Partners and share the accomplishments and struggles encountered in our programs and organizations. This time is valuable because it helps us see our organization from the outside. Learning about others' programs and what each Partner does provides us all the strength and support to continue the work, knowing that the youth are our future.
- The ability to discuss challenges in a safe space and work together to come up with shared solutions.
- Being able to listen to others doing the same work and to share with each other ideas that work or don't work. We have developed trusting relationships that allow us to work collaboratively in achieving our missions and goals.



While the joint gatherings received positive reviews and remain something the Partners value even after the completion of the formal funding period, one challenge remains: how to create sufficient opportunities for all Partners to share their varied knowledge – from program to organizational capacity to lessons learned – with us and with other Partners.

In 2010, nearly a year into the Initiative, our staff said the following to the board about synergy among Partners: “The potential for learning from each other appears very high.

Not only do Partners find opportunities to

learn from each other, they also appear to find validation in learning that others are doing work that is similar to theirs – either programmatically or philosophically. The Foundation clearly has a role in supporting these cross-program connections. Several Partners are planning visits with each other. We think there is value in continuing to support cross-Partner interactions.”

We also had to be mindful that taking small, thinly staffed organizations' leaders out of the field to meet with us or to share with peers was costly in terms of the absence of leadership – whether to lead staff or volunteers, to meet

with children or ‘ohana, or to run a chain saw. So it was imperative that any time away from core work added value. We made it a practice to seek input and revise activities to ensure they were worth the time spent.

Lee’s report noted: *Partners appreciated that their input about activities was continually sought and considered. They noted that the workshops and convening format changed (in response to feedback from Partners) over time for the better. Going to different locations and hands-on, interactive experiences were mentioned as high points.*

There are many examples of how Partners generously shared information and ideas with each other. They shared program practices such as ideas on working with older youth, back-office operations and fundraising; they did exchanges with youth and they shared practices on engaging parents. Logs were shared for carving wa‘a (canoes), and one Partner even built a sustainable office and restroom facility for another. A long-time staff member from a Partner organization reported reaching a breaking point at her organization and decided she would quit. Not until she called a staff member from another Partner did she begin to see alternatives. She later told a Foundation staff member that she would never have thought of reaching out to peers like this had it not been for the Hope for Kids Initiative.

We conducted a series of Peer Exchanges in an attempt to focus on program implementation before we began formal program evaluation. With considerable Partner input and support from PREL, we developed a program self-assessment tool to help Partners identify areas of strength and weakness in program implementation. Afterward, some Partners, but not all, said the tool was useful. Using the tool, we supported two peer-learning rounds in which groups of two Partners visited a third Partner’s site. The visits were generally viewed positively, but the amount of feedback Partners gave each other about program implementation varied. These sessions were generally more focused on learning by observing how others did their work. Offering program feedback seemed a bit forced and in some situations even contrived. This is probably an example of the Foundation’s desires outweighing Partners’ needs or readiness.

According to Lee, the Partners summarized the value of peer learning in this way: *The cultivation of deep relationships over the six-year period was noted. There were multiple opportunities to meet, work together, and share, which resulted in lasting professional and personal relationships and what many stated was the creation of a statewide network of place-based organizations.*



Photo provided by Ma Ka Hana Ka 'Ike

The upright Southern Cross (Hinaikamalama) points south.

Evaluation

The Struggle to Find Effective Yet Respectful Means of Evaluation

While it takes a lot more time, participatory evaluation produces a rich learning experience and is worth the additional time required to engage with others. Said a Partner, “The Foundation’s commitment to the collaborative nature of tool development and field experience, in which the Foundation did not take a didactic role, but rather uplifted co-learning and observation, trusting in the unfolding of learning ... resulted in reciprocal growth and expanded understanding.”

We decided at the outset of the Initiative that evaluation would be an integral part of the work. This expectation was shared with all Partners. We explained that evaluation was necessary for two primary reasons. The first was continuous improvement and learning. If Partners and the Foundation were going to get better at their work, we would all benefit from knowing what works and what doesn't, and from finding ways to improve. Second, the Foundation felt that the Partners' valuable work should be shared with others. In our minds, evaluation would be a tool to communicate the value of the Partners' work. To be certain we engaged all Partners and the Foundation in the evaluation, we crafted a participatory evaluation plan.

Evaluation was implemented in three primary ways. Initially, the Partners, the Foundation and an external evaluation group, PREL, developed a tool for assessing program quality. We felt this was necessary before beginning any type of outcome evaluation because Partners were at various stages of developing their programs. Coupled with the program quality work, which was implemented with peer exchanges, the Foundation also provided "TA (technical assistance) Bucks" that could be redeemed for evaluation, technical assistance and training by PREL. Anything from understanding how to collect and analyze data to developing a program logic model was eligible for "TA Bucks."

The next step was to develop a formal program evaluation plan that all 10 Partners would carry out over two years. As part of the plan, a written survey instrument and a set of interview questions for small groups were developed. To varying degrees, all Partners participated, via an Evaluation Working Group, in developing the survey instruments and in revising them over the course of the two-year data-collection period. All Partners also participated in each year of data collection and received findings both for their own programs as well as the overall Initiative. A number of Partners reported using the evaluation findings in

funding requests or to otherwise document their programs' impact. Partners also reported that the discussions about evaluation held over the course of the Initiative were important and valuable.

The third part of the evaluation work was something the Partners strongly recommended. They told us it would be helpful to be able to communicate the value of their work through video storytelling. As a result, the Foundation agreed to underwrite the costs of a single video production company, Palikū Documentary Films, which worked with each of the Partners and the Foundation to produce short videos documenting the work of the Initiative.

Reflecting on our evaluation efforts, we learned four important lessons:

1. Trying to create a "one size fits all" evaluation plan for 10 organizations working with different age groups, in different settings and with different approaches, is extremely challenging.
2. Pen-and-paper evaluation methods for work like this are very limiting. As one Partner said, "We will not view our children as checklists." Interviews and observations are more relevant and likelier to capture the richness and complexity of the work. They take more time to do and require particular skills to conduct effectively, but the findings are more robust than those of written surveys. We all concluded that 'ohana are a great source of input on the program's impacts on their children, but they are harder to reach than program participants or staff.



3. While it takes a lot more time, participatory evaluation produces a rich learning experience and is worth the additional time required to engage with others. Said a Partner, “The Foundation’s commitment to the collaborative nature of tool development and field experience, in which the Foundation did not take a didactic role, but rather uplifted co-learning and observation, trusting in the unfolding of learning ... resulted in reciprocal growth and expanded understanding.”
4. We learned the power of images and, especially, videos to convey the value of the Partners’ work.
- Of all of the aspects of the Hope for Kids ‘Ekahi work, we feel the most challenging was conducting meaningful and respectful evaluation. There is much work still to be done in this area.
-
- This graphic, called a Wordle, provides a summary conceptual overview of the Hope for Kids ‘Ekahi evaluation report through the words of participants, staff, and ‘ohana. The more frequently a word appears in the report, the larger it is in the Wordle.

Of all of the aspects of the Hope for Kids 'Ekahi work, we feel the most challenging was conducting meaningful and respectful evaluation. There is much work still to be done in this area.



This graphic, called a Wordle, provides a summary conceptual overview of the Hope for Kids 'Ekabi evaluation report through the words of participants, staff, and 'obana. The more frequently a word appears in the report, the larger it is in the Wordle.

Finding the people who can effectively serve in staff roles, helping them develop the requisite skills, knowledge and behaviors to do this work well, and then retaining them over time is something each of our Partners face. And, while this is not different from any other employer, what does make this more challenging for our Partners is that they are fairly unique in their approaches and in their delivery systems.

Throughout the Initiative we saw the challenges of building or maintaining strong organizational capacity and how the lack of such capacity can affect program and staff. In a report from the Foundation staff to board in year two we said, “Leadership transition and administrative capacity continue to be primary issues with several Partners. Organizational issues, such as staffing changes, impact on the stability of the Partner. All of our Partners are suffering from the financial strains in the nonprofit sector – so are the youth and families with whom the Partners work.”

We also noted that as Partners grew they were at times challenged to keep pace with those changes. In a report to the board in year three we said, “As Partners become more focused on program outcomes, or as program priorities evolve, the nature of the work being done may also change. These new directions require Partners’ staffs to have new skills and knowledge. Finding the people who can effectively serve in staff roles, helping them develop the requisite skills, knowledge and behaviors to do this work well, and then retaining them over time is something each of our Partners face. And, while this is not different from any other employer, what does make this more challenging for our Partners is that they are fairly unique in their approaches and in their delivery systems. The career ladders leading to this type of work are still limited; the professional development opportunities equally limited; and role models for this work not abundant either.”

In addition to maintaining the human capital to run effective programs, the Partners struggled with the issue of financial sustainability, which we defined as having a steady stream of predictable support that enables an organization to deliver on its mission. Knowing our funding relationship would end, by year three we asked Partners to direct attention to this issue and provided a series of technical assistance offerings and resources. And, while the resources proved somewhat useful, in hindsight we realize we should have begun the discussion of financial sustainability much earlier. There is no easy answer to this question nor does one strategy work for all. Achieving any level of financial sustainability in the nonprofit sector takes a concerted, consistent effort.



Photo provided by Ka Honua Momona International

The upright Southern Cross (Hinaikamalama) points south.

Conclusion

With only a few years of active programmatic development, we know that we are very much newcomers to this work and have much to learn. We are hesitant to share lessons learned as we fear it might sound boastful. Instead, we hope they are read in the spirit intended – as insights gleaned, first to acknowledge them ourselves and then to offer them to others.

We often say that we are deeply grateful to the work of our Partners, for without them we would not have any achievement to measure. This is certainly the case with Hope for Kids. We would have gained none of these insights were it not for the work of these 10 Partners and their willingness to share their ideas and experiences candidly with us.

Our work in developing effective Partnerships continues, as does our work in ‘āina-based education. On June 1, 2016, we launched Hope for Kids ‘Elua with nine Partners. We continue to follow the work of the ‘Ekahi Partners and will be hosting an annual gathering of the ‘Ekahi Partners again in 2017. We have much work to do together to ensure that all of Hawai‘i’s children have hope for their future, and we believe we can help accomplish this, in part, by ensuring they all have access to high-quality ‘āina-based education.

One of the keys to the Hope for Kids’ success was the Foundation’s development of deep and close relationships with every partner, and the way you encouraged partners to develop relationships with one another. Each of us has gained capacity in our work, has grown and widened the areas we touch, and has deepened those areas to include more than we ever thought possible. (Partner final report, July, 2015)

Hope for Kids ‘Ekahi Partners

‘Aha Pūnana Leo
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Hui Mālama O Ke Kai Foundation
Ka Honua Momona International
Ka‘ala Farm, Inc.
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