SUPPORT
CENTER
ACCELERATING POSITIVE SOCIAL CHANGE

EVALUATING SUPPORT CENTER'S

ORGANIZATIONAL
NAVIGATOR PROGRAM:
LESSONS FROM THE FIELD

navigator *(noun)*;

navigators *(plural noun)*

[Historical] a person who directs the route or course of a ship, aircraft, or other form of transportation, especially by using instruments and map; an instrument or device that assists in directing the course of a vessel or aircraft.

[Computing] a browser program for retrieving data on the World Wide Web or another information system.

[Support Center] an organizational coach – as opposed to a consultant – who guides an organization towards long-term sustainability. Navigators provide thought-partnership on key priorities, open up access to networks and resources, and support organizations and their leaders to measure and monitor their progress, building upon a trusting yet results-focused relationship.

NYC

**Department of
Youth & Community
Development**

FORWARD

In the pages that follow, we are pleased to share this "formative assessment" of Support Center's organizational coaching program with the NYC Department of Youth and Community Development. We formally launched the Organizational Navigator program in 2018 and have had the opportunity to work with close to 30 organizations in this way.

In Support Center's 2017-2021 strategic plan, we outlined a goal of empowering organizations through an integrated capacity-building platform. To further this goal, we defined an organizational coaching program that would pair navigators – organizational coaches with a broad range of leadership and management expertise – with organizations to navigate the related challenges of organizational transformation.

The program was developed with a few key assumptions in mind:
- An hour a week of coaching an organization can support change, but it can't just be done with one leader. Rather, a leadership team composed of board and staff together is what is needed.
- Easily administered baseline assessments like the Impact Capacity Assessment Tool can inform organizational plans for change.
- The identification and tracking of key metrics (some would call these key performance indicators) support transparency, accountability and focus.
- Organizational change requires focus, encouragement, guidance and a supportive relationship. Navigators can bring these to the task of navigating organizational change over time.

We are grateful to the NYC Department of Youth and Community Development and the NJ Office of Faith Based Initiatives for their investments in bringing this program to community-based organizations. We are grateful to JPMorgan Chase for their investment in a national community of practice looking into how the Impact Capacity Assessment Tool can inform and support organizational transformation. And, of course, our thanks to those who helped to develop and evolve this program – our navigators, early adopter organizations and staff members.

Lastly, we hope this evaluation can contribute to our understanding of strategies for building the capacity of organizations ranging from funder investment strategies in consulting and coaching to the ways in which organizations think about considering where and how they will transform. If you have reactions to this evaluation as a funder, fellow capacity builder, or potential navigator, or if you want to explore working with a navigator, we would welcome the opportunity to discuss any ideas.

Sincerely,

Keith Timko
Executive Director, Support Center

Support Center, a nonprofit capacity-building organization serving nonprofits in the greater New York/New Jersey/Connecticut area for more than 30 years, commissioned primary research to document and assess the Organizational Navigator program. Launched officially in 2018, though practiced informally for years prior, the program is relatively new and has had close to 30 participating organizations to date. Support Center's leaders sought to hear from those who designed the program, the individuals who function as "navigators" for nonprofits and the leaders of nonprofits who participated in the program with the objectives of:

➔ *developing a succinct description of the program's goals and design;*

➔ *understanding how it was operationalized and evolved;*

➔ *determining what effect the program had on organizational capacity and accountability practices related to planning; and*

➔ *concluding what experience suggests for additional improvements in the program.*

This paper is based on interviews with Support Center staff, five navigators and five leaders of nonprofit organizations who participated in the program, as chosen by Support Center. The insights and inferences from these interviews will be useful for any reader interested in the design of capacity-building programs, but the limited scope of research, with a pool of interview subjects that does not constitute a representative sample, means that these findings, while quite valuable, should not be considered a formal evaluation.

Note on pronoun usage: Throughout this paper, all gender-specific pronouns have been removed from quotes and replaced with they/them/their to protect anonymity within the small interview sample and practice the proactive use of non-binary language.

OVERVIEW OF
NAVIGATOR PROGRAM DESIGN

Support Center works with nonprofit organizations and social enterprises of all sizes and at all stages of their development to strengthen their leadership, management, and financial sustainability. Support Center specializes in organizational development, in strategy and management consulting, executive transition services, and professional and leadership development training. The Organizational Navigator program is the newest of its many service offerings, all of which help nonprofits build organizational capacity across a variety of dimensions.

Having provided a wide variety of project-delimited consulting services for more than three decades, Support Center's leaders observed that, for many organizations with ongoing organizational and planning challenges, short-term consulting projects sometimes resulted in plans that were merely transactional and not transformational in the long-run. In the Navigator program's founding documents, its designers stated, "While nonprofits undertake consulting projects that are episodic" and those may solve immediate challenges, "many nonprofits lack the time, data, expertise and discipline to track and measure progress and success toward organizational goals, mission and vision." Navigation was intended to be a new model "anchored in a long-term approach that pairs organizations with an experienced leader to serve as an organizational navigator in a coaching and advisory role."

But the model was not just focused on providing organizations with access to a consultant on an ongoing basis. The navigator model had three pillars underlying its theory of change:

➜ **Lead with Evidence.** Organizations should identify the data points they need to inform whether or not they are making progress toward organizational goals.

➜ **Access to Resources.** Through the navigators' Support Center connections, the organizations would be able to tap into larger networks for additional financial, governance and staffing resources.

➜ **Make Better Decisions.** Organizations would regularly collect and analyze data and utilize that increased clarity to inform their decision-making. At the same time the navigators would use the data to inform the leadership coaching they provided to better navigate organizational choices.

The Navigator program pairs organizations with an experienced nonprofit leader to support long-term change. At its core, the program provides nonprofits, which would not otherwise have access to ongoing planning assistance, dedicated coaching time – one hour each week or four hours each month – with a deeply experienced former CEO who helps the organization grapple with key strategic issues, such as shifts in the operating environment or growth planning. The "navigators" are long-standing nonprofit leaders (with average experience of over 30 years) who serve as organizational coaches. They are selected from Support Center's pool of over 400 trained interim executives, roster of affiliate consultants and networks including over 100 organizational partners.

After Support Center administers a baseline assessment called the iCAT (Impact Capacity Assessment Tool), a navigator helps each

ORGANIZATIONAL GOALS

Make Better Decisions. What are the signposts and markers to know I am making progress?

Access to Resources. What are the resources that can help us get there?

Lead with Evidence. How do we know if we are making progress toward organizational goals?

organization measure its progress according to key performance indicators that are tracked quarterly. The program is designed to leverage the navigators' knowledge and experience, improve tracking of results, and focus on key organizational priorities.

In its original program design, participating nonprofit organizations would start by taking about six to eight weeks to:

→ Participate in (and facilitate the execution of) an organizational assessment (iCAT) to identify three to four priority capacity areas for improvement;

→ Begin collecting relevant documents and start meeting with the navigator chosen by Support Center to work with the organization;

→ Develop action items for the organization with the assistance of the navigator; and

→ Build a "dashboard" to track and measure progress on action items (see more below on how the dashboard function evolved into monthly progress reports and ultimately quarterly data reviews).

Then, as the organizations and their navigators moved into the "ongoing relationship" phase of the program, the organizations would:

→ Establish a check-in schedule for the navigator and the organization's representative(s) that works for each party

and allocates four hours of coaching time per month (generally one hour per week, but that time could be allocated differently per the organization's wishes). During these hours, the navigator would provide:

● *General organizational "coaching;"*

● *Help on specific problems the organization felt they were "stuck" on; and*

● *Accountability toward the agreed-upon action items and collection of information or data points that could be used to objectively assess progress toward the organization's goals.*

In the process of preparing an interview guide for conversations with navigators and nonprofit leaders, Support Center staff managing the program said, "The Navigator program has flaws, and we have been diligent in documenting them and addressing changes where we have the capacity. Our goal is to work with organizations to establish cultures of accountability through goal setting and honest conversations about risks – and show organizations that they can set attainable goals, tasks to meet those goals, and establish indicators of success." This goal statement for the program, aiming to establish a culture of risk management through goal setting and accountability, was discussed at length during the interviews.

HOW IS THE NAVIGATOR PROGRAM ACTUALLY WORKING?

GENERAL REFLECTIONS ON OVERALL PROGRAM DESIGN ARE POSITIVE

Nonprofit leaders and the navigators interviewed for this research had very positive overall feelings about the basic concept and design of the Organizational Navigator program. The nonprofits themselves come into the program for a wide variety of reasons and with different expectations, and there were many suggestions for improving elements of the program, which are discussed in more detail below. The feedback was uniformly positive about the overall worth of the program and the value of long-term coaching relationships that help organizations plan for the future and keep their organizations accountable for regular systematic assessment of progress toward those goals.

One nonprofit participant said, "I had not been aware of the Navigator program's goal statement as it is articulated ("to help participating nonprofits establish a culture of risk management through goal setting and developing accountability measures and practices"), but I'm not averse to it, and it speaks to our relationship to the Navigator program. It helps an organization ask itself excellent questions." Another said, "Participating in the Navigator program put a lot of things in place that made us prepared for the future."

The core questions seems not to be whether the Navigator program is working or if it is worth the resources being invested in it, but rather, is the primary value in data collection and analysis or the ongoing coaching relationship? There is no one answer to the question, and nonprofits that value one element over the other still see the worth in both as major benefits of the program.

A nonprofit leader said, "I was already a devotee of organizational development, so I definitely considered it an appropriate realm of thought and an opportunity with the iCAT to get a baseline on our operating practices and identify pain points. I had already done a lot to evolve the organization, but when we got to the navigator, the iCAT still identified a lot to work on." Another said, "To continue our progress, we needed metrics, and so the dashboard aspect of the Navigator program was very attractive to us."

> ## "Participating in the Navigator program put a lot of things in place that made us prepared for the future."
>
> — A participating nonprofit leader

Not all nonprofits or navigators agreed with these sentiments about data collection, particularly the dashboard. Prior to the commissioning of this white paper, program participants had already provided considerable feedback to the Navigator program leaders about the dashboard and how it is a poor fit for nonprofits working on issues that are not easily quantifiable for monthly progress tracking (see more details below).

There are also big questions about the best timing and process for identifying the major issues the nonprofit works on in the Navigator program (detailed below), but the basic concept of identifying those planning challenges and organizational accountability issues and then

working with a navigator on an ongoing basis to advance toward those goals received unanimous approval from participants and navigators.

One of the navigators said that, in assessing the merits of the program, the conversations with nonprofits should probe, "How much have they improved their ability to implement and execute? Focus on the ground-level adoption of practices. On execution, determine if the organization has a clear strategy that is achievable. Is there a culture of performance? Doing what you say you're going to do – accountability." In interviews with participants, every one of them professed that the program had indeed improved their planning processes, could point to specific examples, and attributed their organizations' improved accountability to the Navigator program – mostly because of the regular check-ins, relationship building and coaching with their navigator.

"We had a very positive experience with the Navigator program. We got a lot out of it. The focus on accountability is an important part of that," a nonprofit participant concluded.

THE NAVIGATOR PROGRAM IMPROVES ORGANIZATIONS' PLANNING CAPACITY AND PRACTICES

Every one of the five nonprofit leaders interviewed stated emphatically that the Navigator program achieves its goal of advancing organizations' culture of accountability, ability to plan, and processes for collecting data and information points that help organizations better understand their progress toward major strategic goals. Each one easily named a specific example of a way the program had transformed their organization, but their very different answers about the most effective aspect of the Navigator program constitutes significant evidence that this multifaceted, long-term consulting experience is many things to many people.

One organization experiencing extraordinarily rapid growth said the program "had a distinct effect on how we were setting our goals and planning for them. Our navigator recommended we use the 'Rapid Change Model' tool, which really helped us think about how we engage in our organizational partnerships. It helped us take on the 'unknowns,' the obstacles that were keeping the organization in limbo." The most helpful aspect of the Navigator program was "having a model for how to plan – it helps to see what the immediate objectives are, and know what we're losing track of for the long-range, but still have to-do lists."

A leader of an organization anticipating an executive leadership transition said, "our organization is better able to plan for the future because of the Navigator program, especially because of the relationship with our navigator. One sign that we are on a significantly different trajectory because of the program is that we had had a very dysfunctional board, very removed from the organization's daily work. Our navigator helped unpack tensions, asked excellent questions and helped the board envision how it wanted to get to where they envisioned the organization going, and didn't let them veer off course." They added, "The most effective aspect of the program is its help laying the foundation of practice – written goals and a dashboard to track progress, which for us is still a work in progress, but the dashboard does articulate our goals."

A growing nonprofit with a young executive director said, "One way we know participation in the program is having an effect on our organization is that we were thinking about expanding [a specific program], and the navigator really helped us decide if it was a good thing to do. The focus on developing a vision for what is possible is important." This leader said the relationship with and timely counsel from the navigator was much more important than either

the data collection or the accountability practices. "The most effective aspect of the program is having the right navigator who has done this before. This relationship is the reason I'm able to hold it together and keep going. If it hadn't been for our navigator, I might have packed it in."

The leader of a mature nonprofit that had many social service programs with lots of competing priorities said, "The dashboard has some usefulness, because funders always want metrics. The real support an organization needs is help to getting to that point where they can create that data. It is hard to get people immersed in programmatic goals to instead step back and figure out what and how. This has been invaluable to our organization. It is so valuable to have an expert come in and help us with major strategic decisions." They said the most essential aspect of the program is "Having someone we could look up to and trust, someone with experience running an organization in a similar sphere."

Because the Navigator program employs several distinct and important "change agents" – problem identification, planning and practice tools, relationship formation with a trusted advisor, data collection and analysis, and regular check-ins to keep progress on track – it is not surprising that organizations coming into the program at different developmental stages and with varying leadership challenges attribute positive outcomes to different factors. What is notable is that a single program model works so well for so many different types of organizations facing significantly different challenges.

SUGGESTIONS ON HOW AND WHEN NONPROFITS IDENTIFY THE ISSUES THEY WORK ON WITH NAVIGATORS

In the original design of the Organizational Navigator program, Support Center staff would help administer an organizational diagnostic tool – the iCAT – in the first six weeks of the organization's involvement with the program, prior to being its paired with a navigator. In some ways, this makes intuitive sense – the organization should work through a systematic process to identify planning deficits that it may not be aware of and gain a more complete picture of its own challenges before being paired with a navigator who has the experiences and skills appropriate to its environment.

But both navigator and nonprofit leaders suggest that this sequence and the specific diagnostic tool (iCAT) might not be optimal for all participating organizations. Support Center

ORGANIZATIONAL NAVIGATION THEORY OF CHANGE

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM	MEDIUM-TERM	LONG-TERM
Experienced navigators with broad-base of knowledge across governance, leadership and management	Conducting a baseline organizational assessment and document review to determine priorities	Dashboards and progress reports	Heightened accountability towards results and improved use of data to inform decision-making	A broader shift to more data-informed organizations with stronger leadership teams and better risk management to accomplish more	Stronger, more accountable, and more sustainable organizations that deliver greater results towards their mission.
Engaged organizations with a core group of leaders	Establishing high level priorities and measurement strategies for ensuring progress	Regular check-ins focused on strategy, risk management and big picture objectives for an organization	Greater sense of clarity around the direction of the organization		
Organizational assessments such as the Impact Capacity Assessment Tool and the Nonprofit Startup Assessment Tool	One hour a week of organizational coaching with key organizational leaders	Identification of additional resources (e.g. new tools or partnerships)			
	Monthly progress reporting tracking mechanisms				

has already heard this feedback and, according to one navigator, has begun to say "use iCAT as a guide rather than a mandate on what issues to work on, and that is better."

> "No, the issues the iCAT identifies and the issues the nonprofits come in wanting to work on aren't aligned. The iCAT is too close to the 30,000 ft. level and too abstract, too separate from on-the-ground concerns. It would be more relevant to boards than to the day-to-day management. Using iCAT would be okay if placed in context and not made so central."
>
> — An organizational navigator

When the iCAT is administered and by whom, if at all, is another issue. Several navigators and nonprofit leaders suggested that the pairing and relationship building with the coach should start first, exploring the issues the nonprofit comes to the table with, and then once that relationship has deepened, the navigator should help the nonprofit administer the iCAT to identify other issues.

"The issues we worked on were a mix of those identified through the iCAT and others not coming out of it, and my colleagues seemed to feel that the iCAT had limited utility," said a nonprofit leader. "Our navigator had great feedback from the iCAT, but sometimes it felt like the issues they wanted to work on were the issues we already wanted to work on and it felt like they just regurgitated back to us ideas that we already had for addressing the challenges."

Another said, "The iCAT is not my favorite thing. It was really hard to get our board engaged in it. We came into the program wanting to work on board and succession issues, and we later identified other issues we wanted to work on, but the iCAT didn't really figure into the issues we really worked on."

One navigator had more choice words: "The iCAT is a complete waste of time. The relationship with the client should begin before the iCAT is even introduced. The iCAT turns off the organizations, and it never defines what the work really will be. It only identifies what pretty much every nonprofit in the world needs to work on."

Another navigator was more measured, "No, the issues the iCAT identifies and the issues the nonprofits come in wanting to work on aren't aligned. The iCAT is too close to the 30,000 ft. level and too abstract, too separate from on-the-ground concerns. It would be more relevant to boards than to the day-to-day management. Using iCAT would be okay if placed in context and not made so central."

All five navigators had critiques of the iCAT's value or placement in the process, but some of the program participants were more positive about it.

"There was utility in doing the iCAT. We invited many staff and board to do it and every single person did it. It led to a high level of engagement in the process," a nonprofit leader said, "but I'm not sure why the person who goes over the iCAT with the organization is not the navigator. That person walks away and then you have to repeat everything with the navigator. Because of that, momentum was lost, some nuance was lost, and the relationship was hindered a bit."

A navigator emphasized, "It was somewhat problematic that the iCAT was administered by other Support Center staff first, and then I came in.

The organization was upset about the conclusions. They didn't agree with the problems it identified and wanted to focus on other issues. Reluctantly they agreed to use the iCAT findings, but two months later I was working with them on what they really wanted and what I felt they needed."

DATA COLLECTION AND REPORTING HAVE UTILITY, BUT ARE NOT EMBRACED BY ALL

There were very mixed feelings about the data collection aspect of the Navigator program, among both navigators and nonprofit leaders. Some nonprofit leaders and navigators consider it crucial to understanding and marking progress toward important strategic goals. Others said the issues they were working on simply did not lend themselves to data collection or weren't easily quantifiable. Early on in the program, Support Center staff heard from navigators that creating a tracking "dashboard" did not work for most organizations, and those organizations instead moved to monthly reporting documents. Some nonprofits and navigators said this was the right move because some data collection, along with the accountability function of reporting, is necessary for progress. Others, though, maintained that the monthly reporting is not particularly useful either.

"Many parts of the Navigator program were important, data collection was just one aspect, but it is important," said the leader of a multi-service city-wide nonprofit. "Producing data on progress toward fundraising goals and policies and procedures is imperative – it helps everyone understand their roles." But this opinion was not widely shared.

More typically, one nonprofit leader said, "Our navigator did their best to get us to collect data, but the way the program does it is not in a way that we would use it. It is important to reflect and

AS PART OF ITS LEARNING around the use of organizational assessments as a key component of the Organizational Navigation program, Support Center continues to wrestle with the right circumstances and right approach for the use of assessments. Generally, the Impact Capacity Assessment Tool functions as a basis for discussing future plans.

Support Center, through a grant provided by JPMorgan Chase, regularly convenes and facilitates a national community of practice around using the iCAT. Since July of 2019, Support Center has facilitated four iCAT Community of Practice meetings and engaged regularly with eleven capacity building partners, including the tool's developer, Algorythm, in discussions around the use and development of the iCAT. Our community of practice is currently exploring the topics "Addressing Diversity, Equity, and Inclusion and the iCAT" and "Exploring Citywide Usage and Building a Portfolio of iCAT Respondents." Findings from these sessions help to inform the use of the iCAT in Support Center's Navigator program and in other areas of practice.

The following are key partners in this community of practice: H. E. Butt Foundation, Texas; Forefront, Illinois; Community Advancement Network, Texas; OneOC, Southern California; Center for Volunteer & Nonprofit Leadership, Northern California; Program to Aid Citizen Enterprise, Pennsylvania; Youth INC, New York; T. Rowe Price Foundation, Maryland; United Way of Greater Atlanta, Georgia; Tauck Foundation, Connecticut; Pottstown Foundation, Connecticut; Algorythm, iCAT developer, Maryland; JPMorgan Chase, as a funding partner.

use data, and I do believe that nonprofits do get so busy we don't see the strides we've made. Tracking data to understand progress is good but a challenge. The data that is collected has to be something that could be translated into a board report."

Another said, "Both the dashboard and monthly reporting actually really go to my workstyle, but we're not using them. Yes, we did create a dashboard, but it's not what we use to determine progress toward our goals. We have other ways of examining and recognizing progress, other ways of accountability."

The navigators might be expected to be champions of data collection and analysis to guide organizational planning, but these five were not champions of dashboards or monthly reporting in this program.

"Even with the switch to the monthly progress reports, the monthly forms are too detailed," one navigator said. "The problem with the monthly progress reports is that they are either too general or too detailed and a little tedious. I can't imagine Support Center finds the information helpful, and neither does the organization. Any additional data tracking that is separate from their existing data tracking systems is wasteful and unutilized."

Another navigator was even more skeptical, saying "I feel like the monthly reporting was created primarily because the funding source needed to see something, but it doesn't help the client organization. Progress does not really happen in monthly installments, and so everything is 'in progress' in the reports." But another had a more positive perspective: "We did lay out the dashboard and measurements and went back to it occasionally. With the monthly progress reports, I and the client constantly went back to the indicators, so that was working much better than the dashboard."

Nonetheless, at several points in conversation, both navigators and nonprofit leaders said that having the data was useful in making a case for success to those not involved in daily operations, especially board members and funders. One nonprofit leader said, "Our board was very invested in using the Navigator program as a way of getting regular data points on the progress of our work. Some of that was helpful; it gave a 'grounding point' to remember where we were and where we are going."

THE NAVIGATOR RELATIONSHIP, IN ALL ITS MYRIAD FORMS, IS THE PRIMARY CHANGE AGENT

Once the participating nonprofit works through the process of identifying the issues it will work on, the core, most effective element of the Organizational Navigator program is, according to nonprofit leaders and navigators alike, the relationship and practices that take shape over the four hours of navigator-dedicated time each month.

This navigator time (whether or not it is actually four hours per month is discussed at length below) is referred to by some as "consulting" and by others as "coaching." The earliest documentation on the program used neither of those terms and always referred to the professional as a "navigator" and the assistance as "navigation." One document produced later in 2019 describes an "approach that pairs organizations with a seasoned nonprofit executive as an organizational coach." Another document says, "This is a long-term advisory model anchored in the pairing of an organization with a 'navigator' to serve as a thought partner and coach to the leadership of the organization."

The term of choice used to describe the navigator relationship should be clarified to more accurately denote the true form the relationship is expected to

take between the navigator and the organization, taking into account as well who in the organization will engage with the navigator and how. While there were uniformly positive feelings among navigators and nonprofit leaders interviewed about their relationships and the outcomes from them, there were significant differences in understandings of and expectations for the relationships.

One navigator said, "I try to avoid the term 'coaching' in the navigator context because there is a true coaching model documented in the literature, and this was not a formal coaching model." Executive coaching is usually a one-on-one relationship intended to help a leader become their personal best. The subject of this "coaching" relationship, though, was designed to be the organization as a whole. Consulting hours were not meant to be dedicated to the professional growth of a specific individual but instead to help an entire organization – board, CEO, senior leaders and any other staff central to planning efforts – engage in a process of identifying key strategic challenges. Another primary purpose was to help an organization understand how data tracking related to those strategic challenges can keep everyone on the team accountable for their actions towards a set of strategic goals.

Nonetheless, nearly every navigator and nonprofit leader referred to the activities of the navigator as "coaching." So, what form did this coaching take if not the commonly understood role of helping an executive become their personal best?

In the first interview with one of the navigators who was instrumental in the design of the program, the discussion about coaching turned to analogous activities of typical coaching models in sports. In that discussion, three "types" came to the fore, and became the grounding for all discussions about the navigator relationship in all subsequent interviews with consultants and nonprofit leaders. Those three "types" are:
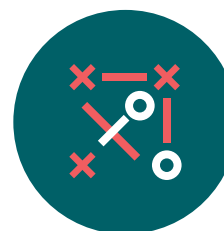
TEACH-THE-RULES COACH

Teaches how to play the game. This is the navigator as an expert who does not get into implementation but focuses on the basics, the "rules" of nonprofit best-practice.

PRACTICE COACH

Makes the team run through the practice again and again so they gain muscle memory and are ready on game day. This is the navigator as a helping hand, and it is easy for this kind of coach to get drawn into the daily work of the organization.

SEND-IN-THE-PLAY COACH

Provides the plays during practices or even during the game. The players make quick decisions in the moment, but the "send-in-the-play" coach tells them everything they should do beforehand. This is the navigator as an in-the-weeds partner, who argues about how to do things, and advises on issues big and small.

This navigator said, "My approach is more about tools and new ways to do things rather than hands-on, 'here's what you should do.'"

"Which aspect of coaching gets applied depends on what the relationship looks like at that moment; it is a combination," another navigator said. "Sometimes the coaching is very project-oriented, discrete things to do. But some of it ends up being like therapy, functioning as an advisor. It really depends on what's happening with the organization at that moment."

"It was a little bit of all those modes," said a navigator who worked at different times with board members and varying levels of staff. "It was different with the ED than with the deputy. With the ED, it was mostly functioning as a sounding board and keeping them focused on what they said was their priority. With the deputy, it was providing resources and helping them go out and get other resources, help them develop how they positioned themselves as a leader and saw their strengths."

Nonprofit leaders agreed that navigator "coaching" took on many forms at different times and with different people involved.

"Our navigator is a great wealth of information and connections, providing lots of resources, which are really crucial," an executive director said. "They have done a little bit of all kinds of coaching – teaching basics, helping practice, giving specific direction – depending on which board or staff they were working with. With senior staff, it has mostly been helping develop better practice habits. But with board members, it has been more giving specific directions about what they should do at the moment. But throughout, our navigator was always making suggestions and working with people where they are at."

An executive director who worked almost exclusively with a navigator, with little involvement of staff or board, said, "With my navigator, I describe the situation, and they provide helpful suggestions. It's not prescriptive like a trusted doctor. And that kind of relationship, for it to work, you have to be fully open about all your problems and challenges. You can't hold back things you might be embarrassed or ashamed of. They must have that information to be able to give good advice. It's about guidance but also about the non-judgmental support."

Over the course of interviews, it became clear that navigators must play many different kinds of advisory roles over the course of a long-term organizational engagement and that that their deep experiences as former nonprofit leaders with credibility dealing with tough issues, who could be trusted to give advice from a place of honesty about their own past struggles, were immensely important to the nonprofit leaders.

> "With my navigator, I describe the situation, and they provide helpful suggestions, but not prescriptive, like a trusted doctor. And that kind of relationship, for it to work, you have to be fully open with them about all your problems and challenges. You can't hold back things you might be embarrassed or ashamed of, they must have that information to be able to give good advice. It's about guidance, but also about the non-judgmental support."
>
> — A participating nonprofit leader

"It was sort of like a student learning from a teacher," a nonprofit leader said. "We used a lot of time bouncing ideas off of them about how to manage processes related to organizational health – things that we needed to focus on even as we were getting huge projects off the ground. It was a real thought-partnership with our navigator."

One navigator who worked with an organization's executive director, two staff and board chair said, "If I were to do it again, I would spend more time in the first two months with the staff and learning from them their challenges rather than spending time dealing with the iCAT. All three types of coaching were involved in my relationship with them. They knew the issue they wanted to work on. The navigator just needs to help them break down the component parts and how to act on each."

THE PROGRAM'S TIME ALLOCATION COULD BE MORE FLEXIBLE, WITH MORE TIME UP FRONT

There are two aspects of time allocation in the Organizational Navigator program that deserve scrutiny. 1) Is four hours a month enough to make a difference? 2) Do clients and Support Center adequately account for the hours spent by navigators outside of coaching sessions sourcing information for clients, engaging in reporting requirements, preparing for navigation sessions, scheduling with multiple organizational contacts, etc.?

For the most part, nonprofit leaders felt that there needed to be more than four hours in the earlier months during the getting-to-know-you phase, but that once the navigator relationship is strong and fully developed, four hours per month, with some flexibility to do more in one month and fewer in another, is appropriate and

enough to make substantial progress.

A typical perspective from a nonprofit leader was this: "We would have preferred to have more time at the beginning to focus on how we would work together, and more time setting up the workflow. Once we moved past the set-up stage, one hour per week was actually too frequent because we were in such a big crunch time with our projects. So, I would say, it would be better to have more heavy time and relationship building at the beginning and then meeting bi-weekly later."

After a time-intensive set-up period, most participating organizations seemed to be meeting with their navigator every other week.

Another executive director said, "The time allotment was roughly every other week for an hour. Similar to dating, at the beginning you take a lot of time getting to know each other, and then once that happens you move into a stage of steady communications that takes less time, and then after a while, when you share the same way of speaking and you know the same history, you can just do really brief check-ins that can communicate a lot in very little time."

But the navigator themselves, more cognizant of the time spent outside of the direct organizational communications, had more pronounced feelings about the inadequacy of the time allotment.

"This is a core issue with the navigator program. The time allocation does not work. There isn't enough time to give organizations what they need," one said. "I just ended up doing double or triple hours than were allocated."

Another said, "There is definitely too little time up front. The allotted hours for navigation does not count additional time outside for the calls and meetings spent on reviewing, creating

instructions/plans/suggestions, etc. The allotted time should be closer to 6-8 hours per month." Driving home the point that work outside of direct contact with the client is not adequately accounted for, another navigator said, "I have been trying to stick to four hours per month, with half an hour on the books every week. At the beginning it was more like 8-10 hours per month, not counting the documentation I had to do for Support Center."

While there are clearly some issues around time, navigators and nonprofit leaders did strongly endorse the value and worth of the basic model that this innovative program represents. Both the navigators and clients felt that, once the relationship settled into a "dynamic steady state," four hours of consulting time on task each month has a huge impact on an organization's ability to focus on long-term goals and advance its mission.

THIS PROGRAM IS SUBSTANTIALLY DIFFERENT FROM OTHER CAPACITY-BUILDING PROGRAMS

In addition to the specific examples of changes in their organizational practices each leader was able to name (mentioned in an earlier section of this report), all five nonprofits were also able to detail ways in which participation in the Navigator program had increased their ability to plan. Many had had previous experiences with other kinds of capacity-building consulting and said that this program is very different and more effective than others.

A nonprofit leader whose organization was experiencing major growth said, "We took on creating a blueprint/map for our future, we created goals for each quarter, and that really helped us focus on the areas of our work that were not the major big-money projects that were getting so

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— A participating nonprofit leader

much attention from our organization. That led us to refocusing on training capacity outside of the big projects and on more communications planning."

Several others talked about significant improvements in board functioning and improved fundraising that resulted from that. Said one, "We did a board retreat that centered on ideas and materials our navigator suggested, which laid an important foundation so that when the COVID crisis came and we asked the board to contribute to a matching campaign, the board members contributed $15K and that amount was matched by the community. That wouldn't have happened without the groundwork that was laid with the Navigator program. It tells me that board members are getting it, that we don't have to tell them everything they should be doing. They now have a much better understanding of what it means to be a responsible board member."

The nonprofit leaders said that the long-term relationship with a trusted advisor who has decades of experience with capacity-building issues makes the difference. They consistently pointed to, and differentiated this experience from, other forms of project-based consulting that often leave nonprofits with products, like a strategic plan, but not with actual capacity to put those plans into action.

"The Navigator program is different from other consulting experiences in two really important ways," an executive director said. "In previous consulting relationships, we got a report and then the person just left. The progress just doesn't happen when you are left with a report. This kind of relationship keeps you checking in with the plan. Second, the quality of our navigator is so much higher than others we've had. The level of experience they possess is so deep. That creates a safe space for growth."

The "tough love" that navigators give is also a highly valued factor. "The biggest difference between this program and other consulting services I have experienced is having an expert come in with a critical eye and say directly what should be fixed," a nonprofit leader said.

"It feels like every consultant has a fancy tool to sell, which can be useful, but our navigator really asks us questions that help us identify a solution ourselves. You co-own the strategy," another leader said. "Having the navigator there when you are implementing is what really makes it different from other consulting relationships. Usually in others they give a plan and then you have to implement it with no additional support. A navigator is there when you are putting management tools into practice.

Almost every one of the nonprofit leaders interviewed had had experiences with capacity-building consultants that did not compare favorably to their experiences with a navigator. Stories like this were common: "We had worked with [a well-regarded and prominent consulting practice] and, at the end of that consultation, I was not happy because there was no help on execution of the plan that was developed. We needed that ongoing help and the roadmap to getting where we wanted to go. The Navigator program is about trust and getting to the working roadmap."

PARTICIPANTS ASSESS THE VALUE OF THE NAVIGATOR MODEL

After delving into the core elements of the program and suggesting improvements for the Organizational Navigator program, nonprofit leaders assessed the overall value for their own organization and others like them. While there were variations on why the program has value for nonprofits, there was strong consensus that the this type of program represents a rare opportunity for nonprofits that don't often have the financial resources to invest in these essential long-term planning efforts.

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— A participating nonprofit leader

on schedule and can help you stay focused," one executive director said. They added, "And with a program like this, the navigator can be engaged with many organizations at once, so it is efficient for funders who have many grantees that need this help."

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>
> — A participating nonprofit leader

Many focused on the fact that nonprofits do not get the kind of planning resources that are common in the business world. One said, "Especially at this time, there is such a microscope on inequity. And nonprofits generally don't have access to the kind of coaching and planning that corporations take for granted – and government contracts and foundation grants generally don't allow for nonprofits to hire consultants to make the progress they need, to take the time and resources to become strong. Nonprofits usually can't afford a program like working with a navigator, but these kinds of services are vital to be able to achieve your organizational mission and to be really good at what you do."

One leader put it in stark ROI terms: "This small amount of dollars goes a long way. The $300K we've raised during the COVID crisis, we never would have raised if it hadn't been for the $8K investment in the navigator program."

But nonprofits that have experienced the Navigator program value all of its component parts, not just the coaching time. "The quality of this program is far superior to other planning and consulting experiences we've had. Creating data that is useful both internally and externally, to be able to answer the tough questions that get asked, is so valuable," an executive director said. "These are things we need, but which are usually not supported to do through grants and contracts. Having someone come in and give solid advice and resources, not having to reinvent the wheel ourselves, is something every nonprofit should have."

CONCLUSION

Support Center's Organizational Navigator program has a model that is significantly different from most other existing capacity-building programs, and, according to the limited number of program participants interviewed for this research, it is achieving its objective of advancing organizations' culture of accountability, ability to plan, and development of procedures for collecting data (or other key milestones) that help organizations better understand their progress toward major strategic goals.

Nonprofit leaders and the navigators interviewed have strong positive feelings about the basic concept and design of the Organizational Navigator program. The nonprofits themselves come into the program for a wide variety of reasons and with different expectations, and there were many suggestions for improving elements of the program. Overall feedback, though, was uniformly positive about the inherent value of long-term consulting relationships that help organizations plan for the future and keep their organizations accountable to overarching strategic goals.

The navigators' and nonprofit leaders' suggestions for improving the program were in the following areas:
➔ **Build the relationship first.** Get the navigator/ nonprofit relationship-building process

started *first* by working on the issues identified by the nonprofits themselves. Once that relationship is solidified, have the navigator help the nonprofit use the iCAT and go over the analysis of its results instead of having other Support Center staff administer it.

→ **Streamline the data collection.** Further develop the program's data collection and reporting processes so that they are useful to, and integrated with, the organization's other reporting needs, such as board reporting.

→ **Increase the upfront allocation of coaching time.** Integrate more accurate accounting of the navigator/nonprofit time that is necessary to ground the coaching relationship in the early months. After the relationship-formation and information systems set-up phase, four hours a month of consulting time – with sometimes more time in one month and less in another – can have an outsized impact on an organization's ability to plan, collect relevant data and keep driving toward overarching strategic goals.

The navigator must play many different kinds of "coaching" roles over the course of the long-term organizational engagement, depending on evolving circumstances and who within the organization the navigator is working with at the moment. Navigators' deep experiences as former nonprofit leaders with credibility dealing with tough issues – who can be trusted to give honest advice about their own past struggles – are immensely important to the nonprofit leaders.

Most of the nonprofit leaders interviewed had had experiences with other capacity-building consultants prior to participating in the Navigator program, and those did not compare favorably to this experience. While there were widely varying opinions on which elements (or combination of elements) of the program had the greatest value for nonprofits, there was significant consensus about the innovativeness of this program and the unique opportunity it presents for nonprofits usually unable to invest meaningfully in such critical long-term planning work.

SUPPORT CENTER

ACCELERATING POSITIVE SOCIAL CHANGE

NY OFFICE

32 Old Slip, 24th Floor

New York, NY 10005

Phone: 212-924-6744

NJ OFFICE

One Gateway Center, Ste. 2600

Newark, NJ 07102

Phone: 973-718-7336

SUPPORTCENTERONLINE.ORG