Leaning into Learning in Times of Crisis:
A Case Study in Unity Care's Propel*Next* Journey

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> "I started this organization to address the social injustices that are impacting communities of color and specifically African Americans... We're not just dealing with the foster care issue – we're dealing with a whole system."
>
> - André Chapman, CEO and founder of Unity Care

Leaps, Lessons, and Blessings in Disguise

The true test of leadership and resilience is often realized in the midst of crisis — those times when organizations either falter or rise to meet the challenge and navigate change. For the team at Unity Care crisis came in the form of unwieldy growth and a new program for high-need foster youth that stretched the agency's capacity beyond its limit. After decades of successfully providing underserved youth and families with housing and support services, the agency had tough decisions to make.

Founded in 1992, Unity Care is a nationally accredited, strengths-based, and family-focused agency with deep experience in Northern California. Its overarching goal is to provide safe, stable, and affordable housing and supportive services for young adults as they age out of foster care. The organization specifically serves families and transition age foster youth (TAY) ages 16-21 in Santa Clara, San Mateo, San Francisco, Placer, El Dorado, Alameda, Nevada, Sacramento, and Solano counties. Over the years, as the Bay Area housing crisis has become more acute and the number of TAY in need of support has grown, Unity Care has expanded its footprint and operations to respond to emerging needs and opportunities. In many ways, the racial justice movement has fueled Unity Care's determination to continue its laser focus on supporting youth of color in the foster care system. "The Black Lives Matter movement really hit us - all of us as an organization – hard," one board member reflected. "It gives us an opportunity to share that the organization is actually very successful in being able to care and nurture and support these youth."

By 2019, the organization was running over 23 programs, with 200 full-time staff and an annual operating budget of $20 million. In the words of André Chapman, the organization's founder and CEO, "It has been an exhilarating, challenging, and rewarding journey from a single foster home with five boys to an organization that annually serves more than 7,500 youths and families across Northern California." It was around this time that the state of California began to overhaul its state foster care system and Unity Care stepped up as one of the first providers to serve severely challenged foster youth who the State was unable to place with foster families. For Chapman, it was an exciting opportunity for Unity Care to be "one of the first service providers out of the gate" and to support foster youth who were being left behind. While the intentions were good, things didn't go as planned. The state-designed Short-term Residential Treatment Program (STRTP) was still a work in progress, making it feel "like we

KEY TAKEAWAYS

Faced with a painful crisis and difficult decisions, several facilitating factors helped Unity Care emerge stronger, more resilient, and ready to lead and serve the community in times of crisis.

- The organization's ability to leverage the support of strategic partners and resources like Propel*Next* helped guide and accelerate its efforts to re-focus on its north star.
- Adaptive leadership and the willingness to acknowledge and learn from mistakes, helped renew trust and credibility among stakeholders.
- Modeling and inspiring a culture of learning unified and revitalized staff commitment and strengthened organizational decision-making.
- Commitment to invest in infrastructure and practices for continuous improvement and data-driven decision-making has created a durable foundation for more impactful programs and improved outcomes for youth.

engage R+D

were driving down a bumpy gravel road that was at the same time being frantically paved behind us."[1] Further, leadership openly acknowledged that the agency did not have adequate staffing, resources, and capacity to meet the acute clinical needs of this group of youth. One year into the program, the State declined to renew Unity Care's provisional license and a subsequent newspaper article publically suggested the organization failed to meet the mental health needs of their foster youth. It was a painful turning point for Unity Care. "We simply failed," Chapman said after voluntarily shutting down the homes.[2]

This tipping point forced deep reflection across the organization about its central focus and the organization's future course. "There was a lot going on at the time," Chapman recalled. "It's both a blessing and a curse. The blessing is we'd never move toward our number one priority if we hadn't been through this chaos." A board member agreed, saying, "In hindsight, [the situation in] Santa Clara did us a favor. It forced us to refocus." After years of growth and expansion, the organization found itself at a crossroads.

Unity Care's mission is "to provide quality youth and family programs for the purpose of creating healthier communities through lifelong partnerships. Our goals are to provide safe, secure, and positive living environments; educate and support underserved youth; and prepare young people to pursue professions in which minorities are chronically underrepresented."

Marshalling and leveraging the support of partners and Propel*Next*

Shortly before the crisis broke, Unity Care had become part of the third cohort of Propel*Next*, a three-year intensive capacity-building program implemented by Learning for Action to help promising nonprofits transform into high-performing data-driven organizations. The program was incubated by the Edna McConnell Clark Foundation and is currently supported by the William and Flora Hewlett, David and Lucile Packard, Sobrato Family, Edna McConnell Clark, and Heising-Simons foundations. Each Propel*Next* grantee receives a combination of unrestricted funding and an equal investment in expert coaching, group learning sessions, and a peer learning community to enhance its program models, implement strong performance management systems, and develop organizational cultures that practice ongoing learning and evaluation. The funding partners believe that investing deeply and directly into helping youth-serving organizations apply robust performance measures can help them set strategic priorities informed by data and improved decision-making, measure and track performance and impact, and use evidence to increase support for their work.

"Resistance to change is human nature but the faster the leadership of the organization submits and commits to the process, the more successful they will be."

– Unity Care board member

According to Chapman and members of the board, the timing of Propel*Next* could not have been more serendipitous. With support from the Propel*Next* team, Unity Care was able to fortify infrastructure and narrow focus on what it does best. According to Chapman, "Propel*Next* was like the guardrails on the road as you drive up the mountain...they helped us reimagine the organization and gave us a roadmap."

Unity Care's experience is not uncommon for a nonprofit, particularly at a time when the social sector is buzzing about ways to scale impact and promising solutions to meet ever-growing needs. Unity Care serves as an instructive example of adaptation and resilience in the face of crisis and provides useful insights about how to navigate change and refocus on an organization's north star. In this case study, we highlight several key levers that have been hallmarks of the Propel*Next* program and have been exemplified by Unity Care including (1) courageous and adaptive leadership, (2) organizational alignment, and (3) data-driven decision-making grounded in a culture of learning. **By 2020, the organization has returned to its roots and core strengths, spinning off its community-based programs to a strategic partner, and focusing on three key housing programs (instead of 23) with a full-time staff of 50 (instead of 200) and an annual operating budget of $5 million (instead of $20 million).** This is the story of how the organization got there.

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[1] Quote taken from page 103 in Chapman's book *Roses in Concrete: Giving Foster Children the Future They Deserve.*
[2] Quote taken from the San Jose Mercury News article "State agency blasts San Jose foster care provider Unity Care for failures with high-risk youth" by Julia Prodis Sulek.

Adapting and evolving as a leader is always important, but during times of crisis it is often the crucial ingredient for effectively navigating change and harnessing opportunities to learn, grow, and flourish. Unity Care's executive and board leadership exemplified many of the characteristics of adaptive capacity and resilience by openly acknowledging the organization's failure and taking responsibility for making things right. Interviews with Chapman, board members, staff, funders, and the PropelNext team illuminated examples of several actionable insights that have guided the organization from crisis to transformation.

Embracing responsibility and learning from mistakes

A key attribute of adaptive leadership[3] is the ability to embrace responsibility and acknowledge when the organization is not living up to its promises and mission. For any leader, taking responsibility for failure is an inherently emotional process and getting an organization to accept missteps takes courage.[4] "Every organization, through its lifecycle, goes through some transformational period, not only [in terms of] service or the business objectives, but I think personally too," explained one of Unity Care's board members. "André struggled narrowing it down to one business model because he wants to save the world and that's the best part about him."

Photo courtesy of Unity Care

As the board and executive leadership team grappled with the prospect of downsizing, their PropelNext coach observed Chapman "didn't let [ego] get in the way of having a clear eyed assessment of the gravity of the situation, at the same time as holding on to a sense of purpose and the opportunity to add critical value to transition-age foster youths' lives."

> "Through [André's] own metamorphosis and with the leadership of the other folks that we have, we couldn't have done it... [André] was willing to take some hits where he needed to take them, take some criticism where he needed to take it."
>
> – Unity Care board member

Chapman's willingness to openly acknowledge mistakes and seek solutions impressed the board, staff, and organizational funders. In fact, his willingness to do so instilled greater confidence in his ability to lead the organization forward. "When we were giving up all these programs, I think André felt like a little bit of a failure. He wanted to really stay in it, stay in the game, and was willing to put in as many hours as needed to turn this around." This sense of responsibility, "was something that the leadership team needed and gave them a tremendous amount of confidence," one board member observed. A funder had similar observations noting, "Unity Care has embraced the PropelNext learning opportunity and the constructive feedback. André's emails to me shifted from somewhat rose-tinted to more proactive and open-ended, so that also showed progress from my point of view."

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[3] The Adaptive Leadership framework was created by Ronald Heifetz and Marty Linsky to help individuals and organizations adapt and thrive when faced with challenges.
[4] https://hbr.org/2011/04/strategies-for-learning-from-failure

Accepting support and expert guidance

In addition to engaging the board and staff, Chapman also needed to contend with public perceptions and concerns from external partners and funders. Propel*Next* funders, Edna McConnell Clark Foundation, the Heising-Simons Foundation, and the Sobrato Family Foundation were naturally concerned about Unity Care's ability to fully participate in the program and successfully complete the grant objectives. Rather than pulling their grants, they engaged in dialogue and Unity Care wholeheartedly committed to an improvement plan. The plan required executive-level participation in the Propel*Next* activities, learning sessions, and completion of program milestones. Unity Care also agreed to an onsite financial review by a Propel*Next* financial consultant and to launch its pilot program for TAY in two counties as originally planned. Unity Care leaders worked closely with a coach on organizational issues and a data consultant to help them strengthen the data system and implement data collection instruments to track program participants.

But the commitment to the improvement plan was not about checking boxes. It was about relationships, partnerships, and an organizational journey. Chapman recalled attending one of the first Propel*Next* learning sessions realizing "this is pretty serious stuff," and he would need to do more than just show-up. At a subsequent cohort learning session he reflected on the experience of standing in front of a room of his peers and being very vulnerable about his leadership journey, openly sharing "all the things I could have done differently, things I didn't do so well, things I did well. We really had a conversation. That was a little bit scary, but I went for the ride."

> "We grabbed [all of the Propel*Next* resources] – every one of them because we needed them to reimagine the organization."
>
> – Unity Care leader

Chapman, his team, and the board also fully leveraged the support of their Propel*Next* organizational coach and resources. Admittedly, Chapman was initially skeptical but after meeting his coach he realized his deep and relevant expertise. "This guy is coming to me with love for his community [not] some consultant that's trying to learn my industry [but he] really knows what I'm talking about." At that point he realized he needed to "pay attention" and "really begin to invest in it."

Board members shared similar sentiments, with one noting, "It's almost divine intervention…Propel*Next* couldn't have come at a better time. Could we have [navigated this transition] without Propel? I don't know. Maybe. But it would have been a whole hell of a lot more painful and we would have taken more steps backwards before we took steps forward." According to another board member it was the way that support was delivered and the partnership that made the engagement transformative. "The people we worked with at Propel*Next* gave very, very clear direction and they held the organization accountable to it. But at the same time, no one ever felt like the people at Propel*Next* weren't in the organization's corner and doing everything they could to make the people within Unity Care successful."

Clarifying mission, purpose, and core strengths

A third key ingredient for courageous and adaptive leadership is the ability of executives and boards to clarify an organization's mission and to continuously strive to get better at pursuing it. The leadership team and board had been mulling over shifts in strategy long before they reached the inflection point with STRTP. But as Chapman and others noted, the crisis may have been a blessing in disguise. It "forced not only our staff, but the board of directors and André to make a decision to get back to our roots," a board member recounted. Housing had always been the space where Unity Care excelled. "Moving away from the group homes was painful for André but, ultimately, he embraced it wholeheartedly and realized that moving [back] into this TAY housing was the right place for us. We realized that we needed to focus in on the few things that we did really well, and all of this pushed us there faster."

Unity Care used the theory of change framework provided by PropelNext to reflect on their central purpose and core strengths while still delivering on its "Five Pillars of Success" which ultimately led them to double down on a new housing initiative, *A Place to Call Home*. Housing has always been at the heart of Unity Care's work and this initiative allows the organization to scale its existing housing continuum – from shared housing to apartments – in communities in Northern California where housing for transition age foster youth is in short supply. According to the PropelNext coach, the process "of clarifying, honing, focusing on who you're working with and why, and what you're providing them became a real touchstone, a platform for re-imagining and recreating Unity Care."

Modeling and inspiring a culture of learning

5 PILLARS OF SUCCESS

"We've had organizational change before," Chapman recalled, "and every organization goes through transitions and change initiatives," but he has found it helpful to give it a name and be clear about its purpose. With change "fear creeps in and [people] freeze – it's fight or flight." Unity Care named its organizational change efforts the *Propel Initiative* and "that is what people talk about throughout the entire organization." Chapman and the leadership team have strived to normalize the conversations about change and create an environment where everyone is striving to learn and continuously improve.

"Propel taught us that it's okay to be forthcoming and that it's important to be vulnerable and to be honest about the things that you're experiencing if you truly care about making a difference and being able to understand where you could be better," a member of the leadership team shared. With support from PropelNext coaches, leaders at Unity Care not only sought to build staff capacity to use data for continuous improvement but more importantly to build safe and brave space for honest discussion about what needs to change. "You're going to make mistakes," a team leader said. "We want [people] to own that it's okay to make these mistakes. There would be no point in data learning if it's always perfect." Building a learning culture is an ongoing journey but according to one senior leader, the process thus far has been transformative and "it has really changed the dynamic." Staff are now coming to the table with both challenges and potential solutions.

In addition to creating space for reflective conversations, the management team uses various ways to engage staff. At the suggestion of PropelNext, they implemented a Learning Culture Survey to assess staff climate and anonymously gather their perspectives. "It was framed around [creating a] learning culture, but you can well imagine that staff used the opportunity and open ended questions to say whatever they wanted to convey to leadership," the senior leader

> **"What we've been able to accomplish here is making people feel like they're not just another number. Their opinion matters. We want to hear their opinion and we want to have meaningful conversation."**
>
> **– Unity Care leader**

shared. One important revelation from the survey was that management had overlooked the importance of internal communications as they focused their attention on managing external public relations issues. Staff wanted to be in the loop and "to understand what's changing, how and why, and what it means for us," the PropelNext coach observed. Another important benefit of the survey was management's ability to get a pulse on staff engagement during a particularly challenging time. According to the coach, "Their quantitative scores were the highest I've ever seen, ever and we've done this Learning Culture Survey assessment with easily over 100 organizations... [In] change management you need some early wins to build upon. I think that was the epitome of an early win."

A second major milestone in Unity Care's journey was organizational re-alignment around its core mission and north star. This resulted in yet another painful process of spinning off many of its programs to another agency and reducing the budget and staff by approximately 75%. A number of factors helped to facilitate this transformational process in a relatively short period of time.

> "Let's not do all these things but do the things we know we do really well and go deep in that."
>
> – Unity Care leader

Strategic and timely partnership

Unity Care has a long history of working with public and nonprofit organizations in the region to address policy and systems issues while providing supports and services for foster youth and families. Prior to the crisis, Unity Care had been exploring a merger with Seneca Family of Agencies, one of California's largest providers of education, mental health, community-based and family-focused treatment services for children and families. The relationship between the CEOs of both organizations had developed over twenty years and the strategic alignment between their agencies had naturally evolved over time. When Unity Care decided to spin off its community-based services, it had a ready partner at

> "[Unity Care and Seneca] went from explore to execute on their partnership pretty rapidly. It was the right thing, the right partners, the right time."
>
> – Propel*Next* coach

the table. According to a Unity Care board member, the partnership "let us, in good conscience, transition our community-based services over to Seneca who was better equipped to handle that piece of it while we were able to focus on the TAY housing." As Unity Care focused on housing, the clinical and other services were taken over by Seneca. They provided administrative support, coaching, and even some staff, while Unity Care refocused and realigned its new team. Team members from Seneca also attended Unity Care's board retreat and were closely involved as the re-alignment process evolved.

Aligning talent with organizational needs and mission

Investing in people and developing talent is yet another critical ingredient for building a learning organization and achieving better results. In addition to downsizing and eliminating redundant positions, Unity Care leaders had to assess skill, will, and talent gaps as they built a new housing initiative. Over time, many staff were let go while others chose to leave. The organization ended up retaining only a handful of its original team. Now, new staff make up 90% of the restructured 50-person team.

> "The really weird thing about working in crisis mode is not only the stress that you feel, but it forces you to be quite innovative and entrepreneurial. Your decisions become a lot clearer than if you were working in an environment where it's just day to day where you become a little bit complacent."
>
> – Unity Care board member

While distressing, the leadership team understood substantial turnover was "an opportunity to more explicitly articulate the focus around data-driven learning and ratcheting up the expectations around data," their Propel*Next* coach noted. They reimagined and redefined staff positions and sought team members who "understand the purpose, the need, and the importance of data," a leadership team member explained. The remaining staff demonstrated resilience, commitment, and the ability to effectively adapt to a much leaner and streamlined organization. "The employees who are still here - God bless them, "a board member reflected, "they stayed with it. They were with an organization that had one mission and then it had changed and then their coworkers were disappearing, getting laid off. And so those folks really stuck it out and have been a part of the change." One of the leadership team members explained how "there's so much that's

happened, and we had to do it very quickly. It's like we're experiencing all of the startup challenges with the overlay of 27 years of experience."

Setting clear expectations

Senior leaders have also focused their attention on setting clear expectations and level setting with both team members and the board. One board member was pleased to see the way staff across the organization were engaged in conversations about data, noting "This organization is at an inflection point where we need to be more driven by data. Our organization is based on impact and that's how we're measured. That's how we know that we're being successful."

There has also been growing acknowledgement that everyone at Unity Care is ultimately accountable to the community they serve, and the organization's sustainability requires discipline and laser focus on what they do best. As one board member explained, "Propel*Next* is teaching us to not only recover [and] survive - and here's the key - to also sustain."

> "Leadership did a good job at engaging all stakeholders, got their input, brought them along, had them socialized on pretty radical changes. I think that was really important and really paid off in the end."
>
> – Propel*Next* coach

He emphasized that they did not "go through all of this to keep being in surviving mode, but you have to be able to overcome it and have a sustainable model." Another board member shared the focus on sustainability and being leaders of housing for transitional age youth, has been one of the biggest accomplishments. They observed a renewed energy among staff and organizational leaders, noting "There is so much hope and excitement [among staff] who say it's okay to go from 23 programs down to three because we are now given the ability to focus and be really good at something...this is what our communities want to see to make sure we are the agency that we say we are." Rather than seeing it as punitive, organizational leaders and staff are seeing it as "a great opportunity for their professional advancement and development as well."

Strengthening and embedding data capacity across the organization

In addition to realignment, Unity Care is striving to embed a learning orientation into its organizational culture. It's not a "one and done" activity but rather a mindset and ongoing cycle of learning, adapting, and continuous improvement. A lack of reliable and systematic data often means organizational leaders and program staff make decisions based on anecdotal information, assumptions, and intuition. To help organizations embrace a learning culture, Propel*Next* provides frameworks, peer learning sessions, coaching, and technical support to strengthen the systematic collection and use of data. Despite the many challenges Unity Care was grappling with, the organization was able to forge ahead with its efforts to strengthen data infrastructure and use.

Building more effective infrastructure and systems to gather and use data

The staff and board openly acknowledged they did not have or effectively use data to drive decisions. "We've struggled with how to harness the data that we have [and] how to use it most efficiently to ensure that we're meeting our five pillars," one board member shared. "But Propel*Next* is helping us get the data so that [staff] can do their jobs...and the [program] committee has the information it needs to be able to guide and oversee" program efforts. "[We can now] go back to board meetings and report information in a cognizable, articulate way." Another board member described the feeling of data paralysis, a common predicament experienced by many nonprofits that have

> "[Staff and the board] love looking not just at the finance side [of the dashboard] but the number of youth being served, the age brackets, how many are actually enrolled in school or some type of job training ... we are looking at all these metrics and making sure that we are on track."
>
> – Unity Care board member

been unable to use data efficiently and effectively. "There was too much data. Too much that it becomes useless. I was getting more verbal feedback from the staff than what the paper was showing me," they said. "I have seen in the last year a transition...the conversations and data presented at the board meetings are much more focused. There's not nearly as much superfluous data that doesn't help."

With support from Propel*Next*, the Unity Care team has designed more user-friendly reports and data dashboards that are easy to digest and generate fruitful discussion. Unity Care has also institutionalized various board committees that review different types of data and engage staff at all levels in communication updates and data-informed discussions. "The board presentations in particular, have focused on the quantitative data that we need. The meetings are actually a

Photo courtesy of Unity Care

pleasure now. Whereas before, we would just be bogged down in talking about what the hell does any of this mean and how is this helping me, and the organization determine whether our programs are successful?" explained one board member.

Building muscle to use data for program improvement and organizational decisions

In addition to increased data use among organizational leaders, program managers began to engage case managers and other staff in data discussions. "At first, we were just having managers participate in [the data] meetings, and then we realized we have to have all the case management team and all the direct service staff be a part

of these meetings about data collection. They started with data, but now they're more about program operations," a senior leader shared. These discussions have brought about deeper engagement around co-design and piloting assessment tools, leading to increased capacity and more buy-in across program teams.

Their Propel*Next* coach also observed shifts in staff fluency and their ability to discuss and interpret data. This has translated into deeper conversations and a leap forward in their ability to use data to better meet the needs to youth when "six to nine months prior, that wasn't even an agenda item in these team meetings." From board members to case managers, people across the organization are using and discussing data in new ways.

Examples of Data Tools and Reports

Learning culture survey: Self-reported assessment completed by staff to evaluate the culture of the organization and give them the chance to provide feedback on areas that can be strengthened.

Agency Dashboard: A reporting tool that provides at-a-glance proof of services and impact by giving program managers a snapshot of all clients served at once. The dashboard provides a real-time snapshot of assessment scores and time spent by each case manager to ensure youth are receiving support they need.

Client Dashboard: A tool used for discussion between the case manager and the young person. It provides talking points to help case managers and youth discuss their progress and assess where additional resources/time must be spent to ensure the youth's treatment goals are met.

Monthly organizational updates from CEO/Founder: An externally validated 1-2 page progress report sent to the staff and board that highlight updates, accomplishments, challenges/barriers, and what is coming up for the agency.

As part of this journey, Unity Care is working to strengthen the ways it engages and empowers youth to inform program design by creating more systematic opportunities to gather their feedback. "For some of our youth, they have to go through a journey that most of us couldn't even begin to imagine. The grit that they have to show in that process is just intense, and they have to do it alone," a senior leader reflected. "I think [this experience] has taught us that there's value in all kinds of accomplishments and it's important to get that information and data from the youth. [...] I'm getting the feedback from the youth because that's what's really helping us understand what's important to them and drive the conversation based on what their needs are."

"I have seen a steady upward trajectory in terms of our data, getting it to where we want to be, making decisions about what programs to use, costs, evaluations, etc."

– Unity Care board member

The road ahead

The devastating COVID-19 pandemic, economic strife, and social unrest across the country has tested the resilience and resolve of individuals and organizations in ways no one could have anticipated. In the midst of that upheaval, Unity Care has wrestled with its own internal crisis and efforts to re-imagine an organization that has played a vital role in the lives of thousands of Bay Area foster youth for over twenty-seven years. Perhaps now more than ever, we need strong and resilient nonprofit organizations like Unity Care who continue to play critical roles supporting local communities as they struggle to heal, recover, and thrive. As one board member put it, the confluence of crises has "only reaffirmed that we as an organization need to be around [and] we need to take this moment and share our voice."

Photo courtesy of Unity Care

In many ways, Unity Care's story illuminates the importance of introspection, intentionality, and focusing on the silver linings in times of crisis. Having experienced the upheaval of a challenging moment, one board member advised, "Be prepared for the worst. Find a positive in everything. Find a lesson learned in every mistake and be prepared to do the hard work that it's going to take to transition." Unity Care's experience not only elevates insights for other social sector organizations, but for a nation experiencing significant economic disruption and social upheaval. As the PropelNext coach aptly noted, "Navigating a crisis shouldn't be about survival but how we come out on the other side." A critical question for leaders to consider is "what's possible now that wasn't possible before and that question applies equally to when you win the lottery or when you are evicted."

"It's an incredible transformation and the ongoing success will depend on the ongoing commitment to the core principles – focus, discipline, strategic vision, and data-informed decision-making - that helped them get through this crisis."

– PropelNext Coach