

The Scaling of The Encore Fellowships Network

Executive Summary by Beth Benjamin

From Pilot to Network

In just 18 months, The Encore Fellowships Network™ has grown from a single pilot program, involving 10 Fellows and nine nonprofits in California's Silicon Valley, to a network of 100 Fellows and 120 organizations operating in 12 metropolitan areas nationwide. Civic Ventures® – a think tank on boomers, work and social purpose – created an Encore Fellows program model as an experiment. The San Francisco-based organization wanted to test whether structured transitional pathways – in the form of six- to 12-month fellowships – could help experienced professionals at the end of their midlife careers find high-impact roles in social purpose organizations. To see whether a well-designed fellowship program could facilitate the transition and provide value to nonprofits, Civic Ventures launched a one-year pilot program.

Civic Ventures' staff designed and managed the 2009 pilot, sponsored by The David and Lucile Packard Foundation and HP. The program paired former corporate executives – the Encore Fellows – with nonprofits, matching the professionals to the organizations most in need of their particular skills and expertise. The program well exceeded expectations. Fellows were thrilled with their experience and nonprofit executives raved about the impact of their new talent. The discussion quickly turned to expansion.

Excited about the program's potential, the Fellows – and the funders – encouraged Civic Ventures to expand beyond Silicon Valley. They believed that replicating the Encore Fellows program in other locations would make a positive difference not only for individual participants, but for entire communities, cities and the nation. Even so, Civic Ventures remained cautious. The nonprofit think tank recognized that many highly effective programs had failed to live up to expectations when replicated in new contexts. True, expanding the Encore Fellows program could significantly increase its impact. But efforts to bring social programs to scale had often met with mixed success.

After a thorough review of its strategic options, Civic Ventures decided to move forward with the expansion using an innovative network scaling model. This model, which relied heavily on cross-sector collaboration, scrapped the notion of a traditional, centrally run program office and owned, replicated sites and opted instead for an approach that emphasized partnership, distributed responsibility and shared ownership among a set of otherwise independent entities.

Civic Ventures specifically sought to speed the expansion of its Encore Fellows program by partnering with other organizations to form a network of collaborating, yet autonomous, programs – The Encore Fellowships Network, or EFN – with Civic Ventures operating as “the hub.” As an incentive to participate in the network, the hub provided a well-documented, fully-vetted program model and several other benefits that offered value to potential members.

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Encore Fellows Program Model

Each Encore Fellows program involves sponsors or funders, a program operator, host organizations and Fellows (see Figure 1). “Program operators” manage the big picture issues, including identifying and recruiting their own sponsors, and handling the details and relationships involved in running a high-quality program. Operators carefully match Fellows with nonprofits that incorporate the Fellows into their organizations and assign them high-impact, meaningful work. Fellows typically receive stipends of \$20,000 to \$35,000 during their 1,000-hour assignments. In most cases, sponsors and the nonprofits that host Fellows share the costs.

Through their participation in the program, funders achieve social impact while also visibly enhancing employee, community and market engagement. Program operators and nonprofits value the program because it brings needed management capacity and technical expertise to the nonprofit sector. In addition, the program model benefits operators by strengthening their individual missions:

- Complementing the goals and initiatives operators already have in place
- Increasing their engagement with constituents
- Raising operators’ visibility in the community
- Helping them build new relationships with local businesses, foundations and other nonprofits

FIGURE 1: Roles in an Encore Fellows Program

Symbol *	Role	Definition	Common Sources
	Program operator	Social-purpose organization that is responsible for program design, operation and evaluation, and funding generation	Community organizations Nonprofits Professional associations Hybrid ventures
	Work hosts	Social-purpose organizations that host Fellows and ensure high-impact work assignments	Funder’s grantees Operator’s network members Open market
	Fellows	Skilled, experienced professionals with a desire to “give back”	Funder’s workforce Professional associations Open market
	Funders	Corporations, foundations, nonprofits and others that provide financial or other support	Work hosts Grant makers Other corporations Public funds
	Hub	Social-purpose organization that defines core model and brand; provides tools, resources and learning spaces	Mission-aligned organization

* Please note: Symbols correspond to those in Figure 2, page 6.

Benefits of the Production Network Model

During the expansion of the Encore Fellows program, Civic Ventures – known as “the hub” – offered potential program operators a simple and effective way to start up and operate a high-quality encore talent program. Being a member of the EFN offered a number of advantages:

- A well-defined operating model and technical support helped program operators design, organize and launch new programs that upheld the standards of the network while also satisfying the needs of their local communities.
- A low-cost set of online tools based on the Salesforce.com platform streamlined the logistics of operating a high-quality talent program by automating the application processes, structuring the matching of talent to nonprofits and standardizing program evaluations.
- Centralized marketing, brand development and media coordination provided greater visibility for new programs and enhanced their credibility.
- An active learning community, hub guidance and a centralized resource center with templates and examples helped operators design and operate their programs.

Members also enjoyed “network effects” that extended beyond the services provided by the EFN hub. Sophia Chang, executive sponsor of one of the EFN’s largest programs, based at the California HealthCare Foundation (CHCF), put it this way:

We each bring our strengths to the table. CHCF was able to define and launch a Fellows program in record time based on the quality of the tools, resources and support provided by the EFN. And now we see that our example is helping other programs get off the ground.

Although the programs operated independently, they worked together through the network to support a common mission, consistent program standards and a unified brand identity. Each program was also responsible for generating its own funding, which helped to diversify the funding base and build sustainability from the start.

While networks are hardly new to the social sector, they have become an increasingly popular way to further social change across a broad range of causes. Civic Ventures believed that creating a network to scale Encore Fellows programs would enable faster growth, greater reach and a more distributed funding base than more traditional models would allow. In addition, the organization reasoned that a well-designed network would be able to capitalize on the natural variation that occurs as individual entities inevitably modify programs to fit their local needs. Drawing on Peter Plastrik and

The well-defined operating model and technical support helped program operators design, organize and launch initiatives tailored to the needs and interests of their local communities.

Madeleine Taylor's *Net Gains: A Handbook for Network Builders*, the Civic Ventures' organizers developed a "Network Design Blueprint," which provided the structure and organization they needed to launch the network and achieve their early growth objectives.

To properly understand the lessons of the EFN's experience, it is important to recognize that its organizers chose to create a specific type of network – a production network. (For details about different types of networks, see the *Net Gains* handbook, referenced above.) While some networks are formed solely to connect and improve information flows, and others are designed primarily to create a shared identity, production networks are built to produce specific outcomes or "products," such as the development and replication of promising new social programs.

The distinction is important for two reasons. First, because production networks are all about producing well-defined outcomes, they typically require more extensive coordination than other types of networks. As a result, they can be more complicated to set up and manage. Second, the distinction has implications for how relevant the EFN's practices may be to other network builders. Organizers hoping to create other types of networks may gain useful insight from the EFN's experience, but may find the specific coordination mechanisms less relevant to their goals. Organizers aiming to build production networks – especially those designed to replicate programs or services – may discover that many of the EFN's practices directly apply to their own efforts and could be incorporated with only slight modifications.

Even though all Encore Fellows programs adhere to a set of core elements, one of the benefits of a network scaling model is the flexibility it allows local program operators to meet their missions and needs. As Kathy Reich, director of organizational effectiveness grantmaking at The David and Lucile Packard Foundation, said, "One of the real benefits of The Encore Fellowships Network model is that it allows programs to be tailored at the local level to meet community needs. It's not a one-size-fits-all top-down approach dictated by a nonprofit in San Francisco."

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Network Flexibility and Adaptability

Illustrating the flexibility of the EFN's basic program model, the network now incorporates four variations. Although the models differ in significant ways, they each continue to adhere to the core program criteria, ensuring a common brand identity and shared experience:

- **Community programs** – Most of today's programs follow the community-focused model, pioneered by the original Silicon Valley pilot. For example, the Encore Fellows program in Maricopa County, Ariz., now one of the largest in the network, was created by Experience Matters, a regional nonprofit consortium whose program addresses a wide range of social issues.

- **Single issue programs** – The largest program in the network is focused on a single issue: community health care. Encore Fellows in California Community Clinics matched 18 Fellows with clinics and consortia to “help clinic leaders transform the delivery of health care to the underserved in their communities.” The program is sponsored by the California HealthCare Foundation and serves as a model for other similar organizations around the country.
- **Single work host programs** – Aspiranet, a large social services nonprofit in California, created its own internal program in 2011, with seven Fellows in assignments ranging from evaluating Aspiranet strategy and new venture creation to optimizing operations and human resource process improvement. Aspiranet was one of the original pilot work hosts in 2009 and again hosted in 2010.
- **Network programs** – Finally, other networked organizations have created new distributed models. Social Venture Partners Portland, for example, introduced a successful community program, which its parent organization, Social Venture Partners International (SVPI) decided to adapt across its network. With affiliate organizations in 26 cities across the United States, SVPI recently announced the creation of its Encore Fellows program, with initial pilots in several cities slated to launch in 2012.

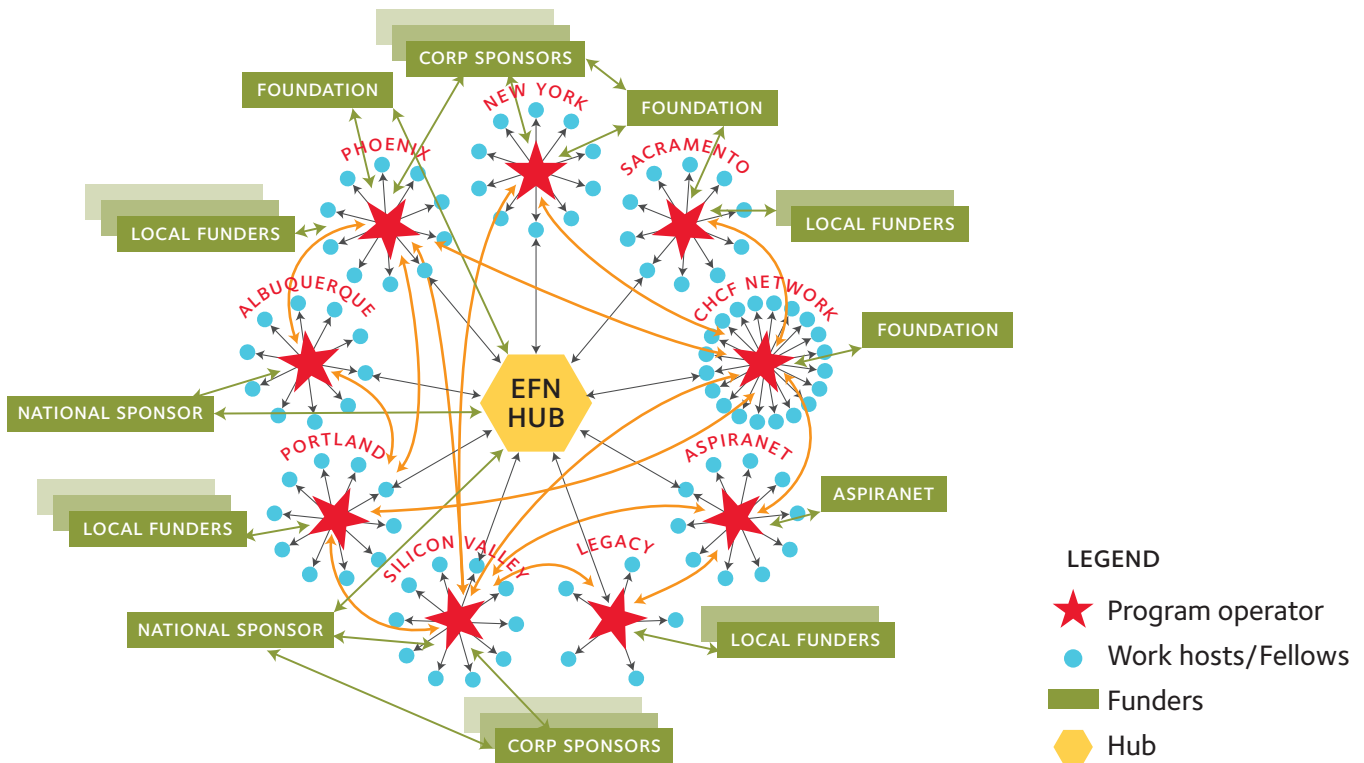
The EFN appears to be achieving this growth while keeping program quality high and infrastructure costs low and flat.

Results

Still in its early stages, Civic Ventures’ network scaling strategy appears to be working. What began as a mere test pilot with one program operator and two funders has grown into a network that includes 10 program operators, 90 nonprofit work hosts and 20 funders (see Figure 2). The EFN has matched 100 former private-sector professionals with high-impact roles in social-purpose fields ranging from health care to hunger relief, from education to the environment.

Those numbers translate into more than 100,000 hours of nonprofit capacity building, dramatically increasing the impact that the nonprofits have on their respective communities. The expansion effort has not only raised awareness of the encore concept (that experienced adults in the second half of life can contribute significantly to the social good), it has also stimulated engagement among a much broader community of participants. In less than 18 months, more than 250 social-purpose organizations have applied to host Encore Fellows and nearly 2,000 people have either applied for fellowships or expressed a desire to apply when programs become available in their communities.

FIGURE 2: Encore Fellowships Network Map



Having already increased the number of programs tenfold, the EFN organizers expect to create about 200 new fellowships in 2012, with most existing programs doubling in size and new programs launching across the country. Even more impressive, the EFN appears to be achieving this growth while keeping program quality high and infrastructure costs low and flat. Without question, the EFN has benefited immensely from Civic Ventures’ assets. In addition to financial, legal and administrative support, Civic Ventures’ thought leaders and renowned media team have elevated the program with key stakeholders, garnered national media attention and provided print and online marketing collateral. These resources have been critical to the fledgling network’s success.

Equally important, the EFN has made it possible for Civic Ventures to gain far greater leverage from its existing assets. The network’s unique structure, systems and processes have enabled the Encore Fellows programs to scale dramatically, while Civic Ventures’ investment has remained relatively constant. Even as the network expands, the EFN hub continues to operate with no more than two full-time-equivalent employees, no central office space, part-time support staff and simple off-the-shelf technology (Google Apps, Salesforce.com and LinkedIn, for example) that has kept infrastructure costs to a minimum.

From the start, the EFN has emphasized the importance of the program operators themselves as a learning community. As Paul Speer, director of the Encore Fellows program at Social Venture Partners Portland, said:

The hub introduces everyone and makes it clear that they're relying on the network to reach out to each other. My peers around the country were a big resource. We're sort of all in the same boat, so I leaned on the programs that had been operating a few months longer than ours. We all actively reuse each others' work.

It may be tempting to attribute much of the EFN's early success to the inherent power of networks, but not all networks achieve such encouraging results. Networks can follow different paths, sometimes lose sight of their goals or simply evolve without direction. Such a variety of outcomes prompts two questions: What allows some networks to become more effective than others? And, what factors have contributed to the early success of The Encore Fellowships Network?

To answer these questions, this paper summarizes the design and implementation practices used to establish and grow the EFN through its first two years. (The full case study is available at www.encore.org/research.) In addition to documenting specific practices and offering a checklist for nonprofits considering a network scaling strategy, the study highlights four themes for those considering production networks to expand their social impact:

- **The fundamental challenge in building a production network is maintaining consistent program standards while leveraging the network's potential for growth, learning and innovation.** Network builders must blend deliberate practices with emergent processes to create a dynamically aligned system that evolves as the network grows.
- **Production networks require considerable upfront planning, systematic evaluation and central coordination.** Because a production network requires coordination among otherwise autonomous organizations, network members must develop a shared understanding of the program they are trying to scale – its purpose and essential design features – as well as the brand they are trying to create. While these outcomes might also be achieved through more emergent processes (for example, awareness and advocacy campaigns or themed gatherings), such processes typically take considerably longer to gain momentum. They also require significant process consultation and may ultimately deviate from the founding members' original vision and desired brand identity. To address these risks, the EFN organizers developed a network scaling strategy that coupled deliberate upfront planning and systematic processes with a deep respect for entrepreneurial initiative, flexibility and trial-and-error learning.



Brent Wojahn/The Oregonian

"My peers around the country were a big resource," says Paul Speer, director of the Social Venture Partners Portland Encore Fellows program, pictured with Fellow Cheryl Edmonds.

- **Contrary to popular belief, deliberate strategic planning and formal processes do not always contradict the dynamic, bottom-up creativity associated with networks.** Once systems and processes are in place to ensure consistency and direction and support ease of implementation, network organizers can devote more of their attention to nurturing and facilitating innovation and entrepreneurial initiative.
- **To leverage the potential of production networks for scaling social change, network builders must “lead then cede.”** Network builders should consider taking a strong leadership role when initially forming a production network to establish direction and ensure an efficient, cost-effective launch. But they must also be willing to cede control as the network evolves. Indeed, one of the trickiest aspects of managing a production network’s early development is encouraging and aligning leadership throughout the network, rather than simply defaulting to a centralized leadership structure. Though initially network builders may struggle to get members to assume greater responsibility, distributed leadership is essential for achieving the unique benefits that can make a network scaling strategy particularly effective. Those advantages include faster growth, rapid diffusion of innovation, greater financial stability and resilience.

If it continues to meet its growth projections, by 2013 The Encore Fellowships Network will be one of the nation’s largest programs bringing experienced private-sector professionals to the nonprofit talent market.

The case study concludes by identifying specific difficulties the EFN organizers encountered as they launched the network, including several that continue to present challenges:

- Getting network members to take responsibility for the network’s long-term governance and sustainability
- Balancing the need for networkwide coordination with the need for local flexibility
- Knowing how much growth and variation the network can handle at different points in its evolution
- Determining the optimal size and structure of the network at maturity

Despite the inevitable challenges, the EFN has made enormous strides in its first two years. It has met aggressive growth targets while maintaining high-quality standards and minimizing costs. With 100 Fellows providing professional services across 12 metropolitan regions, the network is already larger than many more-established programs. If it continues to meet its growth projections, by 2013 The Encore Fellowships Network will be one of the nation’s largest programs bringing experienced private-sector professionals to the nonprofit talent market. It will also provide considerable evidence for Civic Ventures’ core proposition – that experienced individuals in the second half of life represent a significant and valuable workforce for social good.

List of Active Encore Fellows Programs (as of March 2012)

Aspiranet Encore Fellows

Program director: Janet Luce
Email: jluce@aspiranet.org
Phone: (650) 866-4080, ext. 1162
Region: San Francisco Bay Area, California's Central Valley and Los Angeles
Org: Aspiranet
Website: www.aspiranet.org

Central New Mexico Encore Fellows

Program director: Amy Duggan
Email: amy.duggan@uwcnm.org
Phone: (505) 247-3671
Region: Central New Mexico
Org: United Way of Central New Mexico, Center for Nonprofit Excellence
Website: www.uwcnm.org

Encore Fellows in California Community Clinics

Senior program officer: Melissa Schoen
Email: mschoen@chcf.org
Phone: (510) 587-3184
Region: San Francisco Bay Area, Central Valley and expansion to other areas in 2012
Org: California HealthCare Foundation
Website: www.ef-ccc.org

Intel Encore Career Fellowships

Program coordinator: Rick Henderson
Email: rick.e.henderson@intel.com
Region: U.S. Intel Corp. sites
Org: Intel (in partnership with multiple programs)
Website: www.intel.com

Maricopa County Encore Fellows

Chief consortium officer: Nora Hannah
Program director: Linda Mason
Email: lmason@experiencemattersaz.org
Phone: (602) 973-2212
Region: Maricopa County, Ariz.
Org: Experience Matters
Website: www.experiencemattersaz.org

New York and Washington, D.C., Encore Fellows

Program director: Antoinette La Belle
Email: tlabelle@encorefellowships.net
Phone: (917) 361-6638
Region: New York, Washington, D.C., Massachusetts
Org: Civic Ventures
Website: www.encore.org/fellowships

Sacramento, Calif., and Sierra Region Encore Fellows

Program director: Karen Nelson
Email: karen@alf-mvc.org
Phone: (916) 920-5669
Region: Sacramento/Sierra region
Orgs: American Leadership Forum – Mountain Valley Chapter and Nonprofit Resource Center
Website: www.alf-mvc.org

Silicon Valley Encore Fellows

Program director: Gina Cassinelli
Email: gcassinelli@encorefellowships.net
Phone: (408) 832-6269
Org: Civic Ventures
Website: www.encore.org/fellowships

Social Venture Partners Portland Encore Fellows

Program director: Paul Speer
Email: paul@svpportland.org
Phone: (503) 222-0114
Region: Portland, Ore.
Org: Social Venture Partners Portland
Website: www.svpportland.org/fellows

Social Venture Partners Encore Fellows

Program director: Rona Pryor
Email: rona@svpi.org
Phone: (206) 728-7872, ext. 11
Region: Seattle/Tacoma, Wash., and to be determined
Org: Social Venture Partners International
Website: www.svpi.org

Under active development as of March 2012: Arkansas, Boston, Cincinnati, Minnesota, North Carolina and San Diego, and a national expansion of Encore Fellows in Community Clinics. For more information, please contact: Leslye Louie, national director, Encore Fellowships Network, at llouie@encorefellowships.net.

About the Study

The case study of **The Encore Fellowships Network** is descriptive and relies primarily on interviews with key stakeholders and data provided by Civic Ventures and the EFN organizers. Its purpose is solely to document the EFN's design principles, strategy and implementation, in addition to lessons described by the organizers and early participants. The study is not based on a formal evaluation of the network's performance, largely because the EFN is still in its formative stages. As a result, many of the study's interpretive assessments must be considered preliminary until additional data become available. The full case study is available at www.encore.org/research.

About the Author | Beth Benjamin

Beth Benjamin has more than 20 years of experience conducting research, teaching and writing in the field of organizational behavior and leadership development. Formerly the head of Stanford University's Center for Leadership Development & Research, Benjamin has worked with large organizations, small startups, nonprofits and professional services firms.

Civic Ventures | www.encore.org

Civic Ventures® is a think tank on boomers, work and social purpose. The organization introduced the concept of encore careers, which combine meaning, continued income and social impact.

The Encore Fellowships Network | www.encore.org/fellowships

Civic Ventures created The Encore Fellowships Network™ to make it as easy as possible for organizations to start, sponsor and operate their own effective and high-quality Encore Fellowships programs.

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