

A Forest for Every Classroom: A Report on Research into Program Replication and Dissemination Practices

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Introduction

A Forest for Every Classroom Overview

A Forest for Every Classroom (FFEC) is a partnership between Shelburne Farms, the National Park Service's Marsh-Billings-Rockefeller National Historic Park and the Conservation Institute, the Northeastern Natural Resource Center of the National Wildlife Federation, the Green Mountain National Forest, and the Northern Forest Center. FFEC provides teachers with a year-long series of workshops in which they are immersed in field study of the forested landscape, exposed to diverse viewpoints from public and private landowners, and encouraged to transform their teaching into a community-based, real-world model.

The program is a powerful professional development model, and ongoing external evaluation has demonstrated that FFEC excels in meeting its goals. The FFEC staff is taking steps toward replicating the program in different geographic regions of the country. FFEC approached Program Evaluation and Educational Research (PEER) Associates to examine models for program replication and distill the lessons learned. It is hoped that the examples and suggested strategies provided in this report will assist the FFEC partners in successfully replicating this program in regions beyond Vermont.

Replication Research Overview

This report is intended to stimulate thinking and provide concrete replication models to FFEC partners. Taking the program beyond its current scope will require significant strategizing, staffing, flexibility, and financial resources. Because every program is unique there is no one "right" answer for how to replicate a program. This report provides FFEC a context for thinking about its future, and how to bring valuable elements of its program to a wider audience.

This report provides FFEC with an *overview of environmental education and/or youth enrichment programs* that have multiple sites across the country. Methods and tools that these programs have used to replicate are outlined as *replication strategies*. Because this research was limited to looking at a few program models, we have not attempted to classify whether one strategy may or may not be better than another.

The report also considers what these strategies could mean for FFEC's own replication efforts. Replication elements that are most pertinent to FFEC are highlighted and discussed as *FFEC replication considerations*. This section includes a list of questions that FFEC staff may wish to use in developing a replication plan, as well as a list of potential tools FFEC may find helpful throughout the replication process.

Research Methods

Research into replication methods began in January 2006. The FFEC staff was asked to help develop a set of questions that best represents the aspects of program replication they are most interested in learning about when considering strategies for replication. Those questions were used to design a research plan that consisted of a literature review and original research.

Literature Review: Bridgespan Research

One particularly compelling report came from the Bridgespan Group, a nonprofit organization dedicated to helping nonprofit organizations work to their full capacity to meet society's most pressing challenges. In addition to providing technical assistance, Bridgespan conducts research on management models and operational strategies. In 2004, the Edna McConnell Clark Foundation contracted Bridgespan to investigate growth among youth-serving organizations. They found twenty examples that they determined had achieved their goal of expansion. They did not evaluate programmatic quality, but instead looked at the methods the organizations undertook to expand their reach and the results of that growth. They interviewed staff members, investigated management structure, visited program sites, and held focus groups with all program managers. They completed a separate report for each program, and a white paper that synthesized research on all twenty organizations (Bridgespan, 2005).

Because their research is extensive and considers many of the elements the FFEC staff was interested in, this report contains a summary of their work, primarily in the discussion on Earth Force, and in the discussion of findings. The research that Bridgespan accomplished is impressive and may be worth reading in its entirety by someone on the FFEC staff. It can be found at www.bridgespangroup.org/kno_articles_growthstudy.html

Literature Review: Duke University's "Scaling Social Impact"

A second source for information on program replication was a report by Gregory Dees, Beth Battle Anderson, and Jane Wei-skillern. Dees, Adjunct Professor of Social Entrepreneurship and Nonprofit Management at Duke University's Fuqua School of Business, has conducted extensive research on the "scaling out" of social innovations. He has interviewed social entrepreneurs, foundation officers, and experts on programs, organizations, or ideas being replicated, or "going to scale". In personal email correspondence, Dees recommended the Bridgespan documents as the leading research on program replication. He also suggested that useful models are found in his report, *Scaling Social Impact: Strategies for Spreading Social Innovations*. The report was printed in the Stanford Social Innovation Review, a newsletter by the Stanford School of Business.

Organization Research

Original data in the form of personal correspondence provided the third layer of data. We looked at four environmental education organizations that have offices and/or programs at the national or global level. Interview questions were designed that reflected FFEC staff interests and key FFEC program elements (See Appendix). High level staff members at Project Learning Tree (PLT), the Jane Goodall Institute's Roots and Shoots, the Institute for Technology Development's Community Mapping Program (CMap), and Earth Force graciously agreed to 45 minute interviews. Thorough notes were taken during the interviews, and responses synthesized to develop a coherent description of replication models. Program websites provided additional program details.

Discussion of Findings

Literature Review: Bridgespan Research

Current literature on program replication contains observations that are particularly germane to FFEC. Bridgespan synthesized their investigations of twenty youth serving organizations into a series of observations categorized as the *paths of growth*, the *financial consequences of growth*, and the *chutes and ladders of growth*. Because FFEC is a unique program model, with staff members housed in regional nonprofit organizations, national nonprofits, and federal agencies, not all of Bridgespan's observations may be readily applicable to FFEC's current organizational configuration. However, as FFEC engages in the replication, additional observations may eventually become more pertinent. These observations are provided verbatim. Further explanation of each observation is available in Bridgespan's Executive Summary

Paths of Growth

Observation 1: Growth was more often a response to opportunity than the result of strategic choice.

Observation 2: For organizations with multiple sites, finding the right balance between local autonomy and central control was a recurring challenge.

Financial Consequences of Growth

Observation 3: The financial condition of these organizations, even the best known and fastest-growing, was remarkably fragile.

Observation 4: Economies of scale and experience were evident for some of the organizations but not for others.

Organizational Consequences of Growth

Observation 5: Bringing in a chief operating officer was often essential, yet just as often proved challenging for the organization's leader as well as for the staff.

Observation 6: The complexity caused by growth gave rise to the need for formal systems and staff with more specialized skills. These, in turn, tended to create internal stress as well as a more professional organization.

Observation 7: Growth almost always required redefining the role of the board and its members.

Chutes and Ladders of Growth

Observation 8: Foundation funds could propel growth, but they were not likely to sustain it.

Observation 9: These organizations believe program codification was essential in enabling them to expand without sacrificing quality.

Observation 10: The later an organization made performance measurement part of its culture, the more disruptive the process was.

Observation 11: Funds for building infrastructure consistently lagged behind the need for them.

Literature Review: Duke University's "Scaling Social Impact"

In order to learn more about the challenges the social sector faces bringing innovative programs and solutions to a greater number of communities and people, Gregory Dees interviewed foundation officers, social entrepreneurs, and program managers. He concludes that in order to successfully spread what he terms 'social innovations', these 'social entrepreneurs' need *to create a more strategic and systematic approach* to disseminating a concept, program, or organizational model.

He groups his findings in terms of the type of innovation and the method used to spread the innovation. Dees concludes that innovations can be sorted into three categories:

- As an *organizational model*, a specific structure of people and resources configured so as to achieve a goal.
- A *program* with action steps designed to achieve a goal.
- A set of *principles* that consists of values and guidelines.

Of course these are not black and white, and the elements of what a person or organization wishes to scale out often intersect. But if an organization or program can discern which of these elements are most important, they will be better positioned to decide what they wish to disseminate and how to package their innovation for successful scaling out. He encourages program managers to look critically at which *core elements* are essential for the innovation to succeed.

Dees suggests that social entrepreneurs also need to consider how to deliver their innovation to a broader audience. He describes three models for how innovators can bring their organizational model, program, or principles to others wishing to innovate, including:

- *Dissemination*: This model provides information and some technical assistance to a preexisting organization or community, with little oversight by the founding organization. The head organization uses this model when they wish to spread an idea or model broadly and quickly, and are less concerned about the specific details of program management. New sites may be provided with a manual or a set of resources for program startup.
- *Affiliation*: This model has the greatest number of options. There may be a range of agreed upon terms or a licensing agreement that the founding organization requires affiliates to abide by. The affiliate model allows for varying degrees of flexibility at the local level. Affiliates may be encouraged to communicate with one another, sharing program ideas, funding resources, etc.
- *Branching*: This is the most resource intensive model, used by a parent organization that wants to maintain tight control of resources, staff, and program. While branch offices may be given some innovative freedom, a central office will continue to maintain rigid standards, guidelines, and procedures.

Finally, Dees offers guidance on how social entrepreneurs can navigate scaling out and choose the model that works the best for their particular organization, program or principles. He suggests they consider the following "Five R's":

- *Readiness:* Is the innovation well understood? Are the elements of success defined? Is it ready to be scaled out? There must be concrete evidence that the innovation's current success is not based upon an entirely unique set of circumstances, nor is it driven by one individual.
- *Receptivity:* Is there a strong likelihood that the innovation will be well received in another community or organization? Is there a demand for the innovation? Does it conflict with local norms or values in the new location? Is the new community/organization ready and willing, and do they understand the need to devote resources to the innovation?
- *Resources:* What are the true costs for the parent organization and the new community/organization? Is there a high likelihood that there will be local dollars to support a new initiative? Is there a source for generating earned income? Will there be a fee charged to the new organization?
- *Risks:* What are the inherent risks to the organization(s) involved, both the parent organization and the new organization? What are the financial risks, the risks to damaging the reputation of either group? Are there any societal risks for program expansion?
- *Returns:* What strategies will bring the greatest returns, both in terms of success and impact on the intended audience, and for the organizations involved? What will improve the program's effectiveness and efficiency?

Dees' outline of models for scaling out, and Bridgespan's observations, provide an excellent framework for FFEC to continue thoughtful planning. Their positive presentation of the opportunities that exist for scaling out social innovation, and their summary of the frequent and realistic challenges and pitfalls that exist, are well balanced with proven models for program replication.

Program Review

The Community Mapping Program (CMap), Project Learning Tree (PLT), Roots and Shoots, and Earth Force have programs and/or field offices in multiple locations. The replication methods these programs followed were diverse and continually under revision as program managers responded to the needs of the national and local office, and the needs of program participants.

Each program is summarized below in Table 1, which provides a Program Overview, and includes the name of the program, the year it began, a description of the program and the number of sites. Table 2 provides a detailed description of *how programs replicated*. Program replication strategies and management models are broken down into categories that will help FFEC staff understand key elements of the replication history and current status. The replication model, funding, training, national office support, marketing, and quality control/evaluation are all considered. Following that is a discussion that brings together the lessons gained.

Table 1: Program Overview

| Organization | Year Founded | Headquarters | Program Description | Number of Sites |
|------------------------------|---------------------|--|---|--|
| CMaP | 1999 | Institute for Technology Development (ITD), MS | Offers trainings, technical assistance, curricular, and program ideas to teach educators and children how to use mapping and GIS to address issues in their own community. | Five self-sustaining programs deeply integrated with an outside organization; seven new sites currently coming on board in a smaller capacity. |
| Root and Shoots | 1991 | Jane Goodall Institute, Arlington, VA | Stimulates local, grassroots, citizen action projects. Supports volunteer groups in designing and managing programs and recruiting volunteers. Involves all age levels. Program based on learning model that combines knowledge, compassion and action. | Offices in 17 countries; five regional offices in US. Over 7500 groups have registered in more than 90 countries. Volunteer groups range in size from two to 2000. |
| Project Learning Tree | 1976 | American Forest Foundation, Washington, D.C. | Provides K – 12 environmental education curriculum guides and training modules for regional coordinators, who then train volunteer trainers and educators. | Program coordinators in 50 states; curriculum used by educators in nine countries. |
| Earth Force | 1993 | Alexandria, VA | Trains educators to work with students to identify environmental problems in their communities and create solutions. There are currently three Earth Force programs, including Community Action and Problem Solving (CAPS), Earth Force After School, and The Global Rivers Environmental Education Network (GREEN). All three programs involve a six-step problem solving model combining hands on, scientific learning, and civic action. | 10 field offices across the country in nine states. Six operate under Earth Force’s non-profit designation, three are licensed sites yet are part of another organization (nature center, watershed organization, etc.), and one is an affiliate with its own non-profit designation. Also disseminates program through partnerships with organizations in a less formal format. |

Table 2: Program Replication Funding and Management Models

| <h2 style="margin: 0;">Program Replication Strategies and Management Models</h2> | |
|--|--|
| <h3 style="margin: 0;"><i>CMaP</i></h3> | |
| | <p><i>Replication model:</i> Began in 1999 as a partnership between Orton Family Foundation and Vermont Institute of Natural Science (VINS), soon followed by a site in Colorado. Originally worked deeply with a few programs in five states that consisted of partnerships between foundation and regional and public and private entities (e.g. Environmental Systems Research Institute (ESRI), the National Geographic Society Education Foundation, national forests and local technology and conservation groups). In 2005 the program was inherited by the Institute for Technology Development (ITD). One staff is currently housed at ITD. Since its move, a new model is being developed to disseminate the program more quickly and cost-effectively. Efforts are underway to work with preexisting youth-based organizations, including Girl Scouts, Boy Scouts, Boys and Girls Clubs, 21st Century, and other afterschool programs, 4-H, etc.</p> |
| | <p><i>Funding:</i> Historically, both headquarters and partners have contributed to fund raising efforts, but there is no consistent model. They will be looking at a fee-based model with annual fees to remain part of CMaP. Partners have their own financial and administrative oversight.</p> |
| | <p><i>Training:</i> Historically, they worked with regional sites to develop and provide in depth multi day trainings for educators. Program is under transition. Now working to disseminate by offering shorter trainings in more sites across the country. Also developing a 1 day web-based training model. Have created a starter kit with GPS, software, maps. Will be hiring a curriculum contractor to design package of lesson plans.</p> |
| | <p><i>National office support:</i> Headquarters does help with marketing, by providing templates, flyers. Programs manage their own staffing and administrative duties.</p> |
| | <p><i>Recruitment/Marketing:</i> Now using existing national programs such as Boys & Girls Club and 4H to help market the program. Those programs will recruit the educators.</p> |
| | <p><i>Quality control:</i> Provides evaluation toolkit (developed by PEER) to all sites that go through CMaP training. Works with schools to develop standard-based evaluations, and will develop a web-based evaluation.</p> |

Program Replication Strategies and Management Models

Roots and Shoots

Replication model: Originally no strategy or plan for replication. Started in 1991 in Tanzania. New volunteer groups sprouted wherever Jane Goodall gave presentations. In 1996, after 2 years of its arrival in US, one staff person was hired. After a few years, decided to have more staff based out of regional offices. Now there are five regional offices in the US. Two US offices are located at zoos (Boston, Massachusetts, and South Dakota) and one at a University (Western Connecticut State). Roots and Shoots staff are not staff members of these organizations. Roots and Shoots pays rent, and the organizations provide office and program space, access to visitors and students, avenues for marketing, etc. It's been as a win-win situation for both players. *New emerging model:* Currently moving to expand and open new office sites. They may develop matrix for helping to decide where to start a new site. Will choose new regional office sites by density of population, ability to attract new volunteer groups, and ability to create a baseline of programmatic and financial support. They have a fairly standard model for how offices are managed, but allow leeway to flex based on local need.

Funding: Partially covered by annual volunteer group membership fees (US volunteer groups join for \$35/year; international groups \$45). Corporate sponsorship (e.g. Bell South) underwrites large scale efforts, and smaller sources support printing, events, trainings. National office has historically provided regional offices with a budget. *New emerging model:* Regional director will be responsible for local fundraising and financial management.

Training: Regional sites trained by headquarters staff, but not in a formal training procedure. Coordinator's manual provides volunteers with ideas for meetings, projects, and activities. *New emerging model:* Jane Goodall Institute program standards will be pulled together into a regional office manual. There will be trainings for directors of all current and new regional offices. Regional office directors will then be responsible for training their staff.

National Office Support: Two main offices on East and West coast provide support to regional offices. Accounting, fundraising support, and media plans currently run through DC offices.

Recruitment/Marketing: Volunteer mentors/coordinators recruit youth at the local level. Program model shared with formal and nonformal educators and youth groups via schools, homeschool groups, families, community centers, zoos, museums, scout troops, prisons, etc. Regional offices and volunteer groups do their own recruitment.

Quality Control: No formal volunteer or regional office evaluation at this point. Headquarters staff provides oversight and methods for improvement at local sites.

Program Replication Strategies and Management Models

Project Learning Tree

Replication model: PLT uses existing organizations to disseminate curriculum. PLT coordinators are housed in other organizations, and PLT is typically just one of their job duties. Two thirds of program coordinators housed in state agencies, the rest in some combination of nonprofit and state agencies. Recently acquired funding to train university personnel so they can train upcoming teachers. The packaged curriculum and mode of program (train the trainer model) is seen as an advantage to state organizations because they can do a non advocacy based, proven environmental education program without having to develop the curriculum or dissemination model. Do have loose MOU with some coordinators. Trying to get 5-10 sites to do more defined MOU.

Funding: PLT National pays for development and dissemination of curriculum materials. Partner state departments and organizations fund staff positions. Pass through grants are often made available by national office to curriculum coordinators who can disseminate at the local level. There is no licensing fee. No money is exchanged between states and national office. Educators who take PLT workshops pay for workshops and receive curriculum.

Training: PLT's national staff trains coordinators at national and regional trainings. National office trains PLT coordinators who then hold workshops for formal and nonformal educators. Coordinators then train volunteers and educators. There is a coordinator's manual as well as a facilitator's manual for the volunteer trainers.

National Office Support: All PLT staff hired by local partners. PLT national does not offer administrative support.

Recruitment/Marketing: State coordinators do their own recruitment to find trainers and educators.

Quality Control: PLT national office develops and regularly revises curriculum materials, seeks technical review by professionals in natural resources and education field. States have an advisory board. Local sites do self evaluation; national office does formative evaluation of programs.

Program Replication Strategies and Management Models

Earth Force

Replication model: Pew Charitable Trust set up first EF office in DC and intended to disseminate immediately. EF sent out an RFP to existing organizations with the intention that EF become *the* environmental program for that organization. (e.g. in Erie, PA a group of nuns were doing environmental education out of their nunnery; EF's curriculum formalized their program). EF national office develops the curriculum and program model. All EF programs are based on a six step model, which managers believe contributes to ease of dissemination. Three original affiliate sites are now their own 501(c)3, seven still housed in other organizations. Four years after it began, EF established four new field offices. EF researched possible cities for offices, based on likelihood of quality local leadership, and potential for strong financial support. They then searched for appropriate staff. Field office staff offers workshops and curriculum at local level and is involved with EF strategic planning. Programs are also disseminated by nonprofit partners and are smaller in scope. E.g. GREEN is delivered by local watershed organizations across the country, and Earth Force Afterschool is offered through existing afterschool programs. Now moving toward developing deeper partnerships with preexisting nonprofit organizations and corporations, not new field offices. There was an original MOU. Organizations have to demonstrate prior ability to fundraise as well as knowledge and experience with environmental education. A matrix of decision making factors will help to decide new locations. Organizations will need to have experience in service-learning and civic education.

Funding: EF initially had one funding source. EF provided funding to new sites and oversaw budgets. Per agreement in the MOU, new sites needed to be self sustained after three years. *New model:* They are diversifying funding via deeper local engagement which taps local funding sources. Multiple funding sources including foundations, corporate sponsorship (General Motors, and revenue generated from sale of GREEN branded water quality monitoring kits and supporting materials. GREEN has offered a successful distribution model. By partnering with existing organizations (e.g. watershed organizations) program costs and fundraising efforts are shared. National office helps with fund development, both by raising money and increasing the capacity of regional sites to raise money.

Training: They are currently building a formalized system for administrative support and training protocol.

National office support: Originally field sites tightly managed then became more loosely controlled. Moving to an oversight model that is somewhere in the middle, including peer review and monthly updates and phone calls with field. National office holds annual meetings with field staff members, shares resources on best practices of program implementation, and evaluation. National office requires field offices develop a strategic development plan and work plan.

Recruitment/Marketing: National office provides some recruitment materials for regional offices to use to disseminate program.

Quality Control/Evaluation: Two years after EF began, they made a commitment to program evaluation. National office underwrites evaluation for all sites. Brandeis University has been external evaluator. Field offices help ensure evaluation conducted at local level.

Discussion of Replication Strategies and Management Models

Replication methods sometimes follow a strategic plan, and sometimes follow a more organic course. Either way that replication begins, replication continues to evolve, responding to internal pressures, finances, staff needs, or societal demands and interests. As Dees suggests, and as these programs illustrate, early and frequent planning will help programs and organizations achieve replication goals while maintaining program quality. Below is a summary of the key replication elements that stood out as important considerations for FFEC.

Replication Models

Programs are sometimes designed to expand at the same time they begin. Earth Force began with *the immediate intention to bring a program model to a national level*. New sites were solicited with an RFP that explicitly stated that the Earth Force program model would be the premier program for the new partner. While Earth Force allowed some programmatic freedom, new sites had to follow fairly stringent guidelines, and offer specific curriculum and programmatic guidelines, including the program's six step model. The national office has decided that the program will have a greater impact and more financial stability if they focus more deeply in local communities, as opposed to broadening their reach and having a "lighter" program model in many areas. New field offices and programs will be set up accordingly.

Similarly, PLT had a fast national growth curve. Like Earth Force, their program was designed to be the dominant program for the partner organization. *Their rapid rate of dissemination and long term programmatic success may be attributed to their packaging of discreet curriculum guides and a train the trainer model of dissemination*. Relatively few resources are needed by the partner organization to disseminate the program.

On the flip side, *expansion can also be the result of a more grassroots efforts*. New Roots and Shoots programs sprouted up wherever Jane Goodall landed. After several years, the Jane Goodall Institute realized there needed to be an organizational framework to support local effort, and responded by creating field offices at local organizations, including zoos.

CMaP presents a unique model. Due to the *intensive programmatic*, technical, and classroom support needed by teachers who took the teacher training institutes, *a relatively small number of (successful) programs were scattered across the country*. These sites demanded intensive staff and technical resources, as well as the funding to support those resources. Now under ITD's umbrella, CMaP seeks to expand more quickly and is changing its model to have shorter trainings, and less intensive programming and support in each location.

All of the programs have discovered that *providing a succinct, identifiable product, whether it be a curriculum (PLT and Earth Force), a set of programmatic principles (Roots and Shoots, Earth Force), a program model (Earth Force), or a toolkit and short, replicable workshops (CMaP) has helped or will help to keep the programs focused and choose the most appropriate path for replication*.

Partnerships with other organizations are often developed as a way to disseminate the program more quickly, and to take advantage of preexisting organizational structures, staff, and community influence. At some point, all of the programs wanted to take advantage of preexisting organizations. By choosing to disseminate the program through nature centers or environmental organizations

(PLT, Earth Force, Roots and Shoots, CMaP), watershed organizations (Earth Force) or state/federal entities (Project Learning Tree), there was already a staff, office, marketing structure and/or financial management system in place. Some programs chose to have a fairly loose relationship (PLT) while others have a tighter relationship with their new partners (Earth Force). CMaP is now starting to go through preexisting youth groups to disseminate the program more broadly and quickly, and anticipates having less control at the local level.

If a program wants to have tight control at the local level, yet access to another organization's resources, they may choose to *have their own paid staff at a host organization*. Roots and Shoots follows this model. They rent office space at two zoos in the United States and have their own staff located at that site. That staff then has access to zoo visitors and staff, and the zoo has access to the Roots and Shoots program. Roots and Shoots pays rent to set the stage so that they are indeed a separate organization with separate mission, goals and programs.

New field offices started as ways to support existing (Roots and Shoots) or initiate new local endeavors (Earth Force). Those programs that are choosing to keep or start field offices make a number of considerations, including the demographics, the density, the need for the program, the ability to attract participants and local funding, and the availability of qualified staff. They will sometimes create a *matrix* to help identify key criteria for choosing a new site, and to filter possibilities. This will help organizations resist the urge to go wherever they are asked. Program managers offered that it is important to be wary of opportunities that will likely arise and that may sound like a great idea at first, but upon closer inspection do not necessarily contain the right mix of resources needed for success. One manager who was interviewed quipped, "It's sort of like being asked to the prom! It's flattering and you want to say 'yes', to be everywhere. But be wary of those situations!"

Funding

Funding issues continued to create challenges and opportunities for the organizations. The interviews scratched the surface of funding concerns, and focused mostly on how new sites were financially supported. *Corporate and/or large foundation or organizational dollars were often needed for initial program design and dissemination* (Earth Force, CMaP, PLT). Roots and Shoots grassroots programs did not require much funding until a layer of administration and a program framework was designed, then membership fees, foundation money and local and national donations became important for programmatic growth. Fee for service workshops and curriculum, or products are another source of program funding (CMaP, EF).

All of the programs spoke to the need to *secure funding at the local level* and to *develop a mix of funding sources*. They were quick to add that funds consistently lagged behind the need for them. As programs grew, so did funding needs to cover technical support, additional staff, and capacity building efforts. Earth Force and CMaP staff suggested that *planning money* would help them to slow down and be more systematic and less reactive to issues and opportunities that inevitably come up, both at the beginning of a replication effort and now as they are developing new models for growth.

National Office Support

The extent to which national offices provided support to field offices and programs varied greatly and for most programs was changing as a result of program goals and expansion strategies, and current funding. CMaP initially worked closely with a few organizations/programs, providing grant writing and program development. They will now be working less closely with more organizations

and will be much less involved in program oversight. PLT disseminates their curriculum and supports coordinators, but is not at all involved at the local level, and does not provide financial oversight or administrative support. Earth Force and Roots and Shoots both provide extensive administrative and financial support to field offices.

Codifications

Organizations felt that it was important to have some type of agreement with partners and field offices that determines the level of national involvement. This helps to protect both national office and local groups. Partners and/or field offices then know what they are getting in terms of program content and administrative support, and what they will provide. The agreement also ensures that both parties will know what level of decision making power local staff/partners have. This protects the national office, so that the program's reputation is not damaged by under-performing sites.

Program managers are continually challenged by how much program variation and experimentation there should be between sites. Experimentation at the local level can bring about new, successful ideas that contribute to the program quality and may eventually be replicated at other sites. On the other hand, if there is such extensive experimentation that the new sites no longer contain the essential elements of the original program, quality can be lost.

All programs felt the need to develop or had already developed *training manuals for staff and partners*, *training workshops*, and *methods for communication between sites and with the national office*. They also recognized that all of these documents and methods are not static. They need to be continually updated to reflect the changing needs of local sites and the national office.

Quality Control/Evaluation

All of the programs except for Roots and Shoots have some form of program evaluation. Evaluation helps to assess program success, and determine where improvements need to be made. Earth Force, CMAP, and PLT made early investments into evaluation from the start, and feel it has also helped them to recruit partners and receive grant monies. This coincides with Bridgespan's findings. National office has typically funded the evaluation and helped to administer it at the local level. PLT also mentioned a self evaluation tool that they have developed for coordinators to evaluate their own PLT efforts.

Implications for FFEC

FFEC's evaluation work, the existing MOU, the evaluation toolkit, and the pilot replication project with New Hampshire Project Learning Tree create a solid program foundation and the seeds for replication. The staff has addressed many of the questions posed by Bridgespan and Dees, and has made note of the challenges other programs have faced. From this vantage point, FFEC is well positioned for program growth.

FFEC will benefit from further defining what *program elements* are most critical for replication. The FFEC MOU has clearly stated program elements. It may be worth revisiting this document to discern which elements may have room for additional flexibility or where more stringent guidelines might be needed. It may be valuable to develop a *matrix* for deciding where and when to replicate. This will help FFEC to locate and decide upon potential partners. Creating a *strategic plan* will make the process less stressful for staff, will help make the best use of resources and will help to accelerate rate of success.

FFEC partners may wish to systematically discuss Dees' Five R's: the *readiness, receptivity, resources, risks and returns*, and how they are related to FFEC's particular situation. At some point, FFEC will need to choose the proper replication model and consider *dissemination, affiliate, or branch* model or some mix, such as those evident in the programs outlined above.

Similar to the other organizations presented in the study, *funding* will likely present challenges and opportunities. FFEC will need to consider where money to design replication materials will come from, how to support staff and new sites, and what to do in the event of budget shortfalls at their main office and new sites.

Guiding Questions for FFEC Replication

Table 3, below, was created using questions generated from the literature review and interviews with program managers. The questions could serve as a platform for developing a strategic plan, deciding upon a replication model, and determining and prioritizing which tools may be useful throughout the replication process.

Table 3: Guiding Questions for FFEC Replication

| Replication Questions | Potential Strategy or Tool (to Develop) |
|--|--|
| Timeline for Replication | |
| Does FFEC want to grow quickly and get the model out to many groups, or grow more slowly and have more control of new sites? What are FFEC's 1,3, 5 year plans? Is there a strategic planning process in place? What is the funding for replication? Are all staff on board with replication? | Strategic Plan |
| Replication Site Selection Procedure | |
| How will FFEC choose new replication sites? Will FFEC base the choice of sites on demographics, potential constellation of partners, geography, history of successful programs, history of funding, or a leader with specific skills and personality traits? | Matrix or filter that delineates criteria for selection and enables FFEC to screen potential sites |
| FFEC Staffing | |
| How will current FFEC staffing responsibilities change as replication takes off? Will current staff need to put more time into their FFEC responsibilities? How might FFEC partners be "stressed" as replication takes off? What additional skills may current staff need to gain? Are they interested in gaining these skills and/or taking on new responsibilities? What additional staffing might be needed (financial oversight, person to manage replication, marketing, etc.)? How will these new or augmented positions be funded? | Job descriptions for current and future staff positions |

Replication Questions

Potential Strategy or Tool (to Develop)

FFEC Management

Will the current management style (A Team and B Team) be sufficient as replication takes off?
 Will there be a need for an Advisory Board or Board of Directors?
 Will FFEC need to become its own 501c3?
 Will FFEC need to be housed more explicitly at one of the partner's sites?

Strategic Plan
 Development of Advisory Board or Board of Directors

Replication Site Oversight

Is the current MOU sufficient or does it need more consideration?
 How much leeway will sites have in creating their own FFEC model?
 How will staff at new FFEC sites be trained?
 Will all staff be trained or just the "head" staff at new sites?
 Will training take place in their community or yours?
 Who will conduct the training?
 What tools will FFEC provide them with?
 What information will be in a training kit?
 Will the founders or replicators be responsible for marketing?
 Will the founders or replicators be responsible for financial struggles/successes?
 What programmatic developments will replicators need to report to FFEC founders?
 How long will FFEC founders oversee a new site?
 Will it be the goal that a new site will be on their own at some point, or always reporting to FFEC founders?

FFEC Program Manual
 Memorandum of Understanding
 Hire consultant

Replication Funding

Who will be responsible for funding the new site?
 Is there a need for capacity building or feasibility study funds?
 How will additional FFEC founder staff time be funded?
 How will travel time to new sites, meetings, etc. be funded?
 How will FFEC fund the development of strategic plan and replication tools?
 Will new sites pay a certain fee to belong to FFEC?
 Will new sites be responsible for all costs incurred by program replication?
 Will FFEC founders absorb replication site funding?
 Will FFEC founders help cover initial costs and then phase out funding support?
 Will FFEC provide financial support at points in which replication sites can not cover their own budget?
 Does FFEC have one portion of its program that it can package and disseminate in a way that generates revenue?

Budget development:
 including testing various models on paper

| Replication Questions | Potential Strategy or Tool (to Develop) |
|---|--|
| Quality Control | |
| What type of evaluation will FFEC require of new FFEC sites? Will the founders or replicators be responsible for evaluation? If a new site is not performing to standards, what are the consequences? If a new site does not meet certain MOU requirements, what will happen? | FFEC Evaluation Toolkit |
| Marketing | |
| How will FFEC market to find new sites? Will there be a Request for Proposals (RFP)? How will new sites find participant teachers and community members? How involved will FFEC founders be in marketing at the local level? What marketing resources will FFEC provide to new sites? | Website Brochure Development of RFP Program representation in publications like Green Teacher, Journal of Environmental Education; listserves, and at national and regional conferences |

Recommendations and Conclusions

The FFEC founders are eager to make the program available beyond New England. With one replication site underway, FFEC is gaining experience that will certainly help staff determine how to continue along the replication path. The staff is undoubtedly coming up with many questions, ideas, and lists of tasks. This report hopefully provides a framework for considering options and developing a strategic plan.

This report contains a large number of questions, ideas, and observations for FFEC staff to consider. It will be helpful for both the A Team and the B Team to read this document and digest the pieces that seem most applicable. *Reading and discussing this report*, Dees' full article and/or the Bridgespan executive summary may be constructive ways to spark conversation among staff. That conversation may help to create a mutual understanding among all staff about what they are embarking upon, and enable all staff to enter the process with their minds and eyes fully open.

An important first step may be to develop a *strategic action team*, and/or an *advisory board*. This team could conduct a "SWOT" analysis that looks at the *strengths, weakness, opportunities, and threats* that exist. This is one way to *address Dees' Five R's*. With FFEC staff's participation, this team could develop a *strategic action plan* that outlines goals, and one, three, and five year plans. Finding some initial *capacity building money* would be helpful in funding the development of a solid replication model. Finding a corporate sponsor or large foundation support for *start-up money* will also help to bring FFEC's intensive and relatively costly program model to organizations that may not have surplus cash to cover the start-up cost of the program. The intense level of programming may require additional funding and programmatic oversight, leading to increased ongoing costs. It will be important to build this consideration into the budget.

The FFEC staff is housed in multiple organizations, a program element that FFEC staff has identified is core to its success. Nonetheless, it may be important at some point to have a point person or organization at the helm of the program that is clearly designated as the *staff member overseeing replication efforts*. This may help to diffuse the stresses that will arise as demands on staff time and program resources increase. There will likely be a point when it is necessary to *add staff time or a program administrator*. FFEC could also hire a *consultant* to develop a replication strategy plan. It will be helpful for FFEC to create some tools to use during replication. A *decision-making matrix* or other tool will help staff decide where and with whom to replicate. An *RFP* may help find appropriate partners. *Marketing tools*, such as program brochures, a PowerPoint presentation, and a website will be instrumental in getting the word out. It may be helpful for staff to start *attending national and regional conferences* in different regions to seek out potential partners. Eventually, staff will need to develop a *training module for future partners* and *tools for communication* between sites and the national office.

FFEC has demonstrated strong programmatic success. Its unique partnership model, intensive educator training and support, and commitment to evaluation is an excellent foundation from which to initiate program replication. This will serve to attract potential partners. These elements, combined with FFEC's continued commitment to using research as a way to create a working plan will further enhance its ability to move from the planning stage to implementing a replication strategy and achieving its goals.

References

Personal Communication

Hans Cole, Director of Outreach and Leadership for *Roots and Shoots*, the Jane Goodall Institute.

Jerry Fahr, Vice President of Programs, *Earth Force*.

Connie Knapp, Director of the *Community Mapping Program (CMap)*, Institute for Technology Development.

Al Strenstrup, Director of Curriculum Programs, *Project Learning Tree*.

Program Websites

Bridgespan Group [http:// www.bridgespan.org](http://www.bridgespan.org)

Community Mapping Program (CMap) <http://www.iftd.org/cmap/contact.htm>

Earth Force <http://www.earthforce.org/>

Roots and Shoots <http://www.rootsandshoots.org>

Literature Cited

Dees, G., Anderson, B. & Wei-skillern, J.(2004) “*Scaling Social Impact*”, Stanford, CA: Stanford Social Innovation Review, Stanford Graduate School of Business.

Executive Summary, Growth of Youth-Serving Organizations: A white paper commissioned by the Edna McConnell Clark Foundation. (2005). Bridgespan Group, Inc.

Growth of Youth-Serving Organizations: A white paper commissioned by the Edna McConnell Clark Foundation . (2005). Bridgespan Group, Inc.

Appendix

Program Interview Guide FFEC Replication Research

Date:

Interviewer:

Program Name:

Program Contact:

Title:

Brief program description:

1. Can you tell me a little bit about your program history? Where are you at with the replication process?
2. Why did you make the decision to replicate? Was it to expand reach? Was it driven by the outstanding quality of model? Please specify motivation for doing replication?
3. Did you establish guidelines and measures of success? Were there criteria that replicators have to utilize as part of process? Was there in fact an MOU or other legally binding contract? (Examples available?)
4. How much programmatic support did original group supply to replicators?
5. How much administrative support did you provide?
6. What was the funding source for this support? Did this come out of your own budget? Or did they pay?
7. What did you provide - toolkit for program implementation??
8. Did you copyright materials? Copyright the name??
9. Replicating body - was it a single organization or partnership: How many players? Qualities of each organization that contributed to the strength of this group?
10. Did you require continued evaluation at the level you had been implementing? or provide standard evaluation tools? Funding for this??
11. Marketing: methods used by replicators to recruit participants?
12. Staffing: was new person hired? How did the replicators staff the new program?
13. Continuation: did replicators continue to offer program? If nor - poor fit?? Funding dried up??

Question for both original program developers AND replicating group to someday consider:

14. How did this benefit your organization? Did it meet goals?

Ideas for questions that may be useful to FFEC partners when selecting replicators:

15. Describe the collaboration/partnership organizations who will team to offer this program. What are the strengths/resources of each? or maybe What makes your organization "qualified" to replicate this program?

16. How long have you (or the relevant partner) been acting as a PD resource for educators? What type of PD do you offer educators? How would you characterize your (their) reputation or relationship with educators?

17. What professional development activities is your organization currently offering to teachers? Are you offering place-based education PD? What is happening in PBE in your region? And how are you involved...beyond your own offerings?

18. Do you have funding for this replication or how are you planning to fund the program?

19. Do you have evidence of an audience for this program investment?

20. Are your partners willing and able (to fund) to participate in a training/retreat with FFEC founding partners? (Note from FFEC Staff: *I think we decided that this would only happen in the future if they paid for it...i.e. we don't have funds to do this.*)

21. An evaluation question: Are you willing to make a commitment to evaluating this program at a level consistent with what has been done in the past?