Lessons in Program Design and Implementation

Robert Wood Johnson
Foundation

In-depth program evaluations offer the opportunity to explore and learn, especially at moments of inflection and transformation. The Change Leadership Initiative (CLI) Storytelling Project examined a set of Robert Wood Johnson Foundation (RWJF) leadership programs, garnering insights that can support foundations and organizations in the design and implementation of a variety of programs, leadership or otherwise.

With the 2016 launch of the CLI, RWJF established four multiyear leadership programs: Clinical Scholars, Culture of Health Leaders, Health Policy Research Scholars, and Interdisciplinary Research Leaders. These programs were designed to shift the Foundation's leadership development efforts from a focus solely on healthcare to one supporting multiple disciplines that all play a role in RWJF's vision of building a Culture of Health.

Recognizing that the CLI helped RWJF reimagine what leadership programs look like—including the support provided to fellows—RWJF commissioned a case study that aims to illustrate valuable lessons by telling the story of the initiative's development and implementation over its first eight years. The CLI Storytelling Project, conducted in 2023 by McClanahan Associates Inc., draws on interviews and focus groups with 132 individuals who have been involved in the initiative, including RWJF employees, the four programs' national program center staff and advisors, external consultants supporting the programs, and CLI participants and alumni.

DYNAMIC TENSIONS

The Storytelling Project identifies seven high-level dynamic tensions that RWJF and its partners encountered throughout the CLI. Each tension emerges as a continuum, with more conventional views of learning and action at one end and less conventional views at the other.

Tension

Conventional Views ← → Less Conventional Views

The high-level tensions were in the following areas:

- setting goals
- defining leadership
- valuing expertise
- engaging alumni
- negotiating authority
- layering individual programs
- designing and resourcing support

As the CLI evolved from 2016 to 2023, the overall trend was toward more adaptive, less conventional views.

PROGRAM DESIGN TENSIONS

Setting goals

Targeted Goals   Emergent Goals

Defining leadership

Individual Leadership   Collective Leadership

A program can set fixed, targeted goals at its outset, and/or it can allow goals to emerge over time in response to learning and changes in context. The CLI's broad goals provided flexibility but also presented challenges in implementing and evaluating these objectives.

Recommendation: To get clarity on this and other overarching questions, build in ample time for program development and design.

Key questions: *To what extent does a funder want to create robust definitions and specific understandings of goals at the start of an initiative? To what extent does a funder want to sketch broad goals and leave room for meaning to emerge?*

When it comes to defining, understanding, and practicing leadership, some people and communities focus on individual ability and action while others focus on more shared, collective approaches. Staff within RWJF and the national program centers had a range of understandings of leadership and how best to enact it, and those definitions evolved over time.

Recommendation: Consider how a program's primary goals, no matter how they are defined, will engage the dynamic tension between individual and collective leadership.

Key question: *How can programs best balance supporting the development of individual leaders with preparing participants for collective leadership and action?*

PROGRAM DESIGN TENSIONS

Valuing expertise

Developing Knowledge and Skills ⟷ Leveraging Existing Skills and Expertise

Engaging alumni

Ad Hoc or Emergent Alumni Engagement ⟷ Planned Alumni Engagement

Programs can be designed to build participants' knowledge and skills and/or to leverage participants' existing expertise. Given the multidisciplinary nature of the CLI, program participants brought a wide and varied range of skills and expertise, as well as opportunities for skill development, that all needed to be considered.

Recommendation: Recognize participants' expertise and provide them with opportunities to both learn and lead. In ongoing efforts to advance diversity, equity, and inclusion in particular, participants can play important roles in dismantling structural racism through peer and program learning.

Key question: *How can programs best balance honoring and utilizing participants' expertise with providing opportunities for participants to develop their own capacities?*

Alumni engagement can be considered and resourced during (or even after) program implementation. Or it can be built into program design and funding from the outset. By taking an emergent approach, RWJF had the benefit of CLI participants' input but also faced challenges related to funding and support.

Recommendation: Plan for alumni engagement from the beginning, then consistently amplify and celebrate the successes of alumni and current participants alike.

Key questions: *How should funders balance providing support for alumni engagement with creating space for alumni to shape and/or lead the effort? What are the most effective approaches to creating alumni networks, maintaining connections, and facilitating program goals in the long term?*

FUNDER ROLE TENSIONS

Negotiating authority

Funder Direction ⟷ **Program Authority**

On the one hand, a funder can play an active role in directing the design and/or implementation of a program. At the other end of the continuum, a funder can grant full autonomy to an external program team that has been selected to manage the program. Approaching the CLI from opposite ends of this spectrum and with differing understandings of their relationship and the meaning of co-creation, RWJF and the national program centers sought to find middle ground where they could collaborate and co-create.

Recommendations:

- At the outset, establish shared understandings of authority and clearly communicate where the program does and does not have autonomy.

- Define, from the start, what co-creation means and how it will happen.

- Prioritize transparency in decision making as changes or adaptations are made.

- Establish a "keeper of the flame"—a person or a set of documentation—to hold historical context, including expectations and definitions.

Key questions: *What aspects of an initiative are nonnegotiable due to a funder's guidelines and expectations? In what areas do programs have autonomy? If co-creation is an expectation, how and where will it take place, and with what focus?*

MULTI-PROGRAM TENSIONS

Layering individual programs

A Cohesive Initiative   Distinct Programs

Multiple programs can be designed, run, and evaluated as part of a single, unified initiative, or they can be understood and implemented as more distinct efforts. For the CLI, there was tension between the desire for a cohesive initiative and the individual goals of the four leadership programs within it.

Recommendation: Foster more cross-program collaboration across and within initiatives, where possible, to help align efforts toward achieving a shared goal.

Key questions: *What cross-program expectations are realistic and meaningful? How can the overarching initiative and individual programs define roles that are as productive and complementary as possible?*

Designing and resourcing support

Equal *(the same)* Program Supports   Equitable *(tailored to needs)* Program Supports

When resourcing multiple, interconnected programs, a funder can provide equal support to all programs or equitable support tailored to each program's needs. CLI's equitable approach was praised for pivoting in response to COVID-19, but at other times participants desired equality.

Recommendation: To increase diversity, equity, and inclusion, individual program supports should be tailored as much as possible. More targeted learning from participants and programs may be needed at the outset to identify tailored needs and approaches for each program.

Key questions: *Should all program support be equal? Should support be equitable and customized according to need and context? Should it vary by area of support?*

RWJF hopes that the insights gained from the CLI Storytelling Project will help RWJF staff, grantees, and other funders anticipate and mitigate tensions that may arise in the design and implementation of future programs—ultimately producing programs that are increasingly more equitable, meaningful for all participants, and effective in advancing impact.

In addition to this case study, RWJF has been funding a long-term outcome evaluation of the CLI, led by TCC Group. We are integrating learnings, areas for improvement, and innovative approaches to meet long-term needs across the field of leadership and leadership development and within our programs. Ongoing findings from this evaluation are available here.