



Learning from the Journey:

A Critical Look at Capacity
Development through the
Lens of the Step Up Initiative

Table of Contents

Table of Contents	2
Acknowledgements.....	3
Executive Summary.....	4
Part 1: The Context and Design of Step Up and the Learning Review	6
The Step Up Initiative.....	6
Establishing the Narrative: The Origin and Shifts of the Step Up Initiative	6
The Learning Review.....	8
Part 2: Learning from the Journey: Capacity Development and Stories of Change	8
Managing Step Up: Content and Processes	8
Shifting the Power to Participants: Facilitating a Platform for Constructive Peer Learning.....	12
Sparkling Transformative Changes in Individuals and Organizations	15
Part 3: Transformative Organizations: Funding Relationships, Flexibility and a Holistic Approach to Organizational Sustainability	22
Reflecting on Funding Relationships.....	22
Part 4: Conclusion: “It’s the mortar, not just the bricks, that makes a building robust”	25
Recommendations	28
Annex 1	30
Step Up Organizations	30
Annex 2.....	32
Methodology of the Learning Review.....	32

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***“We need circles like this more than ever,
we said at the beginning of the week.***

Political narratives that aim to separate.

We will resist by staying together.

By dreaming up ways to shift power.”

Poem about a Step Up convening

Executive Summary

The Global Fund for Children's (GFC) Step Up initiative was a three-year project from 2018-2020 designed to build the long-term capacity, effectiveness, and sustainability of participating organizations, making them better able to contribute to the protection and wellbeing of children and youth in their communities. Step Up also aimed to strengthen the partner engagement strategies of GFC and contribute to the generation of new ideas in capacity development. It engaged two consecutive cohorts of six partner organizations each through a combination of face-to-face convenings and grants of US\$50,000 per organization. Partners also participated in peer networking and co-learning communities, including regular videoconferences, customized coaching and strategic advice at the individual or organizational levels, and an optional small grant effort aimed at encouraging cross-regional projects.

Twelve organizations participated in Step Up, spanning five geographic regions, and including Brazil, Guatemala, Hong Kong, India, Kenya, Lebanon, Moldova, Pakistan, Serbia, and Uganda. Seventeen individuals from these organizations took part on a consistent basis with additional members joining for specific activities.

Step Up contributed to the growth in both the breadth and scope of programs as well as the organizations' abilities to raise funds for them. Step Up partners experienced noteworthy success in growing their annual budgets. Overall, the median percentage growth in budget was 91%. Five partners more than doubled their baseline annual budget. Across the program period, the 12 Step Up partners raised a total of \$14,232,273. Even beyond the amount of funds raised, more than 60% of partners reported utilizing these resources to launch new and innovative programs: addressing emerging issues (like safe migration, psychosocial wellbeing, or healthy masculinities and feminist leadership) and/or creating collective interventions aimed at achieving systemic change in their regions (e.g., pushing for broader educational reform, or developing a policy research, advocacy and national networking unit). The partners' innovative use of their newfound funding capacity has enabled them to reach more children and youth in their communities.

While the quantitative indicators are noteworthy, the nuances of the Step Up journey surface most powerfully in the narratives of transformational changes that emerged at the individual, organizational and collective levels. Participants were able to reflect on their own leadership styles and responded by opening up spaces for more collaborative leadership, and developing a healthy self-critical recognition of their own power as change makers. Organizationally, Step Up contributed to changes in the development of second-line leadership, more participatory systems that reflect both the specific needs of staff and the communities they serve, as well as integrating self-care and wellbeing in organizational systems and practice. The changes at these levels have ripple effects across communities where partners engage.

In the final analysis, any capacity development intervention needs to make changes in people's lives. While it is perhaps too early to glean many of these direct links, a shifting of power from organizations to communities is already emerging. There are examples of organizations proactively changing their ways of working to be less extractive and more inclusive of community perspectives and participation. One partner even physically moved their office to where community members live to connect more closely with them. Participants acknowledge a need to go beyond charity to effect transformational change. This involves encouraging more youth voices in their own organizations and having more direct community collaboration in their programming.

These shifts were facilitated by the perspectives and methods engaged by Step Up. The initiative employed a broader definition of organizational capacity that included the abilities to reflect and adapt to emergent

and complex situations, while at the same time focusing more on individual leadership perspectives rather than just organizational systems. Step Up also fostered an engaging, experiential, and contextualized learning environment that participants valued more than a top-down training methodology. It gave premium to a facilitative role as opposed to an “expert” perspective when engaging the participants. Safe spaces, co-learning and co-creation methods and relationship building formed the core of Step Up. Many of the changes within the participant organizations resulted from a revisiting of roles and relationships that resulted in empowerment for second-line leadership, improving staff wellbeing, and creation of spaces for critical discussion of program priorities, among others.

As the review takes stock of the learnings and experiences on capacity development, it also presents some recommendations for practice that are aimed at GFC as an organization, donors, and community groups. These seek to contribute to the emerging discourse on capacity development as well as good practice for partnerships that shift power towards systems changes.

Part I: The Context and Design of Step Up and the Learning Review

The Step Up Initiative

Global Fund for Children's (GFC) Step Up initiative was a three-year project from 2018-2020 designed to build the long-term capacity, effectiveness, and sustainability of participating organizations, making them better able to contribute to the protection and wellbeing of children and youth in their communities. Step Up also aimed to strengthen the partner engagement strategies of GFC and contribute to the generation of new ideas in capacity development. It engaged one cohort of six partner organizations for an 18-month period followed by a second cohort with the same number of groups for an additional 18 months. The main modalities of the initiative included:

- Design and facilitation of three week-long learning convenings in India, Kenya, and Lebanon for the first cohort and two in India and Uganda for the second, including project site visits and meetings with local groups;
- Financial support in the amount of \$50,000 per organization, disbursed in two tranches over a two-year period;
- Customized trouble-shooting, coaching and strategic advice at an individual or organizational level;
- Peer networking and sustained engagement in co-learning communities including regular videoconferences; and
- Optional small grants for collaborative cross-regional projects initiated by participating organizations.

Twelve organizations participated in Step Up across three years, spanning five geographic regions, and including Brazil, Guatemala, Hong Kong, India, Kenya, Lebanon, Moldova, Pakistan, Serbia, and Uganda. Seventeen individuals from these organizations took part on a consistent basis with additional members joining for specific activities. (See Annex I). Their work reflected the complexity of challenges and the wealth of possibilities to influence the conditions that prevent children and youth from reaching their fullest potential. The work of some groups touched on multiple aspects of migration; others fostered youth leadership and advocacy in community and national issues, while some worked in education, improving night schools, preventing sexual abuse or enriching opportunities available to girls; and others yet, tackled gender justice and support to young women in the commercial sex trade. All received funding as GFC partners for six to seven years before joining the initiative, were poised for expanded influence in their work, and had advanced to the point where they needed to develop policies and practices to become fully self-sufficient and more effective in their work.

Establishing the Narrative: The Origin and Shifts of the Step Up Initiative

The journey for Global Fund for Children's Step Up initiative began in 2016. The primary motivation came from a perceived demand to respond to the evolving organizational needs of partners that had recently graduated from GFC's traditional funding. The initiative emerged from the assumption that expanded skills in fundraising fostered through intensive engagement, together with resources to hire dedicated fundraising staff were key ingredients to accelerate organizations to greater scale, growth, and sustainability. The initial designs for continued capacity development leaned toward financial sustainability and fundraising, as well as strengthening organizational systems: a "traditional" view of organizational development.



Two participants in cohort one share insights on a site visit to the community of Hay al-Gharbeh in Beirut.

Interestingly, the perspective and design of the program evolved over its implementation as the GFC team engaged more closely with the partners who were involved. Program design and initial participant selection commenced in 2017. By September 2017, Step Up had adapted a more nuanced Transformative Leadership Framework to understand and engage organizational capacities.¹ Instead of just dealing with three initially pre-determined themes of “People, Programs and Resources,” as isolated areas for discrete skilling and capacity building, the Step Up program eventually evolved from the foundation of transformative leadership, which included the expectation that the participants should be able to deal with the three themes from a leader’s perspectives. The Transformative Leadership Framework also included discussions on the

foundational concepts of complexity and systems thinking, adaptive management, innovation, participatory development, theories of change/social transformation, and transformative learning.

Step Up had also shifted from an initial vision of a traditional top-down training methodology to a more co-learning and relationship-based methodology. It was important in the beginning of the implementation of the Step Up process to help the participants to collectively (a) develop a new and common language of development, leadership and change, and (b) develop a relationship of trust and shared safe space. These were invaluable in fostering a learning community that makes possible collaborative learning, peer mentoring, and most especially self-managed learning. Step Up had broadened its lens from the organizational to the individual: focusing more on the importance of leadership and empowerment beyond technical skills.

By its conclusion in 2020, Step Up had arguably developed from a simple cohort of partners to a community of connected and mutually supportive leaders, who represent not only individual organizations but also broader movements.

This review aims to capture some of the narratives of change and surface learnings for practitioners in capacity development. It tries to look at changes that emerged at the individual and organizational levels and what processes contributed to these changes. This review does not assert completeness, as it aims, like the Step Up initiative itself, to provide insights to an emerging and adapting narrative.

¹ The Transformative Leadership Framework introduced by the consultants from Ex:Change consisted of the key components of: 1) **Knowing** – referring to thought leadership and systems/critical/strategic thinking related to transformative social change. 2) **Relating** – referring to transformative relationships within and beyond organizations that challenge hierarchy and foster trust, empathy, positive power, and collective leadership. 3) **Creating** – referring to both fostering agile and effective organizations (systems and ways of working) and innovative and effective programs. 4) **Being (Personal Foundations)** – referring to personal skills, knowledge, values, and principles about broader social change. This also integrates personal wellbeing into development work.

The Learning Review

The learning review took place during the second half of 2020, as the Step Up initiative concluded. It aimed to ascertain the effects of the Step Up interventions on participating organizations, reflecting on learnings with them; to also serve as a vehicle for GFC to increase its capacity to engage partners; and to disseminate the initiative's experience and findings to help galvanize effective practices.

Designed as a collective, participatory process, rather than a more traditional, externally driven process with marginal stakeholder involvement, the Step Up learning review aspired to engage partners to reflect on their own journeys of change both as individual leaders and as organizations. Through a hands-on approach to research design, data collection, and analysis, the review invited participants to expand their knowledge of experimental mixed-methods evaluations appropriate to their work.

From June to December 2020, Rituu B. Nanda, a consultant for the Learning Review, based in Delhi, conducted 29 interviews with Step Up participants, other staff from Step Up organizations, and GFC current and former staff. (See Annex 2). Step Up participants facilitated an additional four interviews with staff from Step Up partners. The consultant conducted five focus group discussions, including two focus groups between cohorts and three additional sense-making or data analysis sessions.

Part 2: Learning from the Journey: Capacity Development and Stories of Change

Managing Step Up: Content and Processes

In conducting Step Up, various learnings and reflections emerged around: 1) the content and conduct of capacity development initiatives, 2) the resultant changes observed in organizations and individuals participating in the program, 3) funds and funding relationships, and 4) GFC's institutional learning and shifts. This section discusses the contributions the Step Up program had to these areas and provides insights and stories that have implications for capacity development practice.

All aboard: Lessons from building learning communities

Step Up represented the first time that GFC implemented a relatively long-term program for partner organizations that had concluded the primary funding relationship with GFC. As such, the team viewed identification of participants as an important part of the process. Since two cohorts took part in the program consecutively across three years, observations from the first selection process informed the second.

In cohort one, GFC regional program officers short-listed organizations on the basis of high scores in the GFC Organizational Capacity Index (OCI), annual budgets over \$250,000 and a demonstrated need for increasing fundraising capacity. GFC asked groups to submit proposals detailing their expected use of the grant funds and then scored each submission. A committee of senior and regional GFC staff and a previous executive director of the anonymous foundation supporting Step Up reviewed and scored applications with extra context provided by regional staff. In addition to considering the criteria, the committee attempted to achieve regional diversity and some alignment around thematic issues with four of six organizations working with young people on the move in some capacity. The committee selected a mixture

of established and smaller organizations, which they felt would most benefit from Step Up. Individual leaders and their leadership styles or motivation to join the cohort was not considered in the first selection process.



FICHD staff engages in a planning exercise at a cohort two convening.

Some participants from smaller organizations in cohort one reported feeling an unevenness between members, observing that participants from larger organizations displayed lower levels of engagement in the co-learning process. Noted one participant, “I felt like the little one here, amongst the big ones.” Established organizations already had mechanisms, policies, and procedures in place to address areas such as human resource management and communications. Newer organizations leaned on the larger ones for help, while larger organizations reported that they did not feel they had a lot to learn from the smaller ones. This created the perception that some organizations were “givers” and some were “takers.”

GFC solicited feedback from the first phase of Step Up to inform the second. The co-facilitator of the first cohort conducted a review of activities carried out in the first cohort and provided recommendations. He suggested for the second round that GFC consider diversity across several measures including geography, theme, and organizational complexity and increase the number of representatives from each organization to two to ensure continuity of learning and a more robust group exchange. He suggested that since Step Up is concerned with strategic organizational processes, participants should be senior-level leaders, and that each participant commit to full engagement in the program. Some participants in cohort one had observed a marked difference in experience levels among participants and noted that not all partners took part in each major activity.

For cohort two, GFC implemented these suggestions and attempted to create a diverse cohort that also had potential for synergy among members. The team considered organizations’ thematic areas, and gave preference to those that focused on strong collaboration, network building, fostering youth leadership, and broader social change objectives. They also held interviews with Executive Directors to delve into their leadership styles, organizations’ vision, and commitment and interest in being part of a global peer cohort. There was also notably less premium given to fundraising capacities or budget size as criteria for selection. The foundation supporting the work did not take part in the second round selection.

Both the selection process and the program design used for cohort two placed an increased emphasis on facilitation and relationships. Cohort one covered more technical content than cohort two, while in cohort two, there was greater emphasis on building interpersonal connections and co-learning. This resulted in participants’ greater desire for and willingness to connect. Stronger connections, in turn, led to deeper conversations and exchange. Noted one participant, “Tutorials are not enough; exchange with others is important. It is not just the knowledge [that is valuable]; it is, especially, [the] people who have learned from their experience.”

The emphasis on relationship building not only fostered greater ownership of the group in cohort two versus cohort one, but also correlated with more incidences of participants taking action in other spheres. In cohort two, we find more examples of building second-line leadership, instituting mechanisms like inclusion policies in the organizations, and shifting to facilitative methods with communities. Nine

respondents from five organizations mentioned concrete examples of shifting power so that it was distributed across a larger group of stakeholders in their organizations. Five out of 12 respondents mentioned transformation in their personal lives. Cohort two also asserted that fundraising is only one part of sustainability. As compared to cohort one, cohort two's respondents spoke more about transformative funding, the relationship organizations have with donors that is mutually respectful and iterative.

Cohort two proved more cohesive as a support and learning group with more consistent virtual interactions that reflected both shifts in the selection process and a stronger emphasis on building relationships. As a result, they were more open and more critical of one another as their trust in each other grew. This underscores the importance of building relationships that promote co-learning. One participant believed that the groups serves as “a platform where everyone can learn and grow fearlessly.” The members of the cohort, as a group, took accountability for the group's issues and came forward to challenge each other and address any matters that emerged.



Two participants in cohort one embrace as they award each other Step Up certificates of completion.

Global perspectives: “Commonalities brought us together, in diversity we grew”

The inclusion of participants from different geographical regions and countries was significant, as it helped break down siloed thinking that is limited in context. “Exposure to different cultures and contexts,” is valuable, according to one participant, “...and the challenge of learning new contexts gets you out of your comfort zone.” In order to understand their peers' stories, cohort members had to listen deeply for contextual and cultural cues. Differences spurred reflection upon the ways that values and communication norms influence strategic thinking and decision-making. It was also powerful for participants to realize that

across the globe, people in similar roles face related challenges: that they are not alone. According to one cohort member, this “pushed us forward, expanded our global horizons, ... gave us new motivation, [as we] discovered new kinds of problems.” This deep listening and reflection sparked inventive thinking and triggered behavioral change on individual and organizational levels. Participants realized that they had to build their program design linked not only to local, but to global changes.

Who guides the journey: A reflection on roles?

GFC works with certain consultants in long-term roles, in which they become deeply embedded in the organization and also contracts others for short-term assignments. Consultants outside of the GFC staff handled the initial operationalization of the project. A long-term consultant, based in Asia, who managed certain relationships in that region, complemented by a short-term project management consultant, developed selection criteria for the partner organizations, a training needs assessment, and a framework for capacity development that underpinned the program organized around three pillars of people, resources, and programs. In place of the project management consultant, GFC later engaged another individual with a deeper experience in civil society and capacity development, to co-facilitate activities for the first cohort. GFC engaged these three consultants primarily because they had limited staff appropriate to deliver a program with the scope of Step Up at that point in its history.

GFC staff observed specific learnings from this experience. In particular, GFC staff noted it is important to align consultant experience with the values underlying the approach to a project. GFC may have initially viewed Step Up as a training program, reflecting a goal to impart skills and knowledge. This perspective evolved to center upon understanding the contexts and capacity aspirations of partners, tapping into their experience, and involving them more intentionally. As a result of this shift, it became clear to GFC that they needed main contributors to the project to be deeply grounded in the types of communities that Step Up participants represent. After making some changes on the team, the members were able to engage the partner groups more organically, and from a co-learning and co-creating perspective, which was invaluable in building the cohorts' outlooks on broader organizational development issues and transformational leadership.

“One can have knowledge exchange in virtual meetings and perhaps some deep conversations, but if the purpose is building deeper and longer lasting relationships then it cannot replace face-to-face connections.”

A second learning point relates to the length of engagement of consultants. GFC had a history of engaging consultants to deliver outputs of certain projects such as workshops and convenings. The two consultants who were intimately engaged with the first cohort were employed long-term and were engaged not only to deliver

specific outputs but also to contribute substantively to the design, content, and learning systems of the evolving program. They were also responsible for the engagement of individual leaders and organizations for coaching and advice. Their role was strategic as reflected in the length of their engagement. This allowed the development of trusting relationships with the cohort members that in turn led to deeper conversations regarding capacity development. In particular, the consultant who facilitated both Step Up cohorts, concurrently served as GFC's Capacity Development Advisor and worked closely with senior leadership at GFC to ensure a flow of learning between Step Up and GFC.

Facilitators as co-learners

Facilitators structured each convening with an overarching theme and asked thought-provoking questions about the topics raised. When cohort members explored these questions collectively, they exposed one another to perspectives drawn from their varied socio-cultural backgrounds, and organizational missions with the facilitators as guides. The facilitators were not passive recipients of the ideas cohort members supplied. One participant described the facilitator's approach at a convening: “He went with the flow,” ... “but at the same time he made sure that the objective of the day was accomplished.”

While the facilitators had considerable knowledge and experience of the contexts and issues emerged by the participants, their approach and demeanor did not position them as traditional “all-knowing” experts. One participant noted about the first cohort's co-facilitator: “We never felt Roger was here to teach us, force learning on us. He made himself as a participant; he was as open as a book; everyone was leading some aspect in the workshop.” Further, facilitators were also learning from the reflections that the cohort members were emerging, even gaining more confidence in their craft. Facilitators most closely connected to GFC also shared openly with cohort members about changes and learning processes underway at GFC, reducing the barriers between funder and grantee and reinforcing the notion that all have something to learn along collective pathways toward social change.

Shifting the Power to Participants: Facilitating a Platform for Constructive Peer Learning

“Capacity objectives can be set, and opportunities for learning provided, but what is learned, to what level of competency and how sustained it is are ultimately in the control of no one but the learner – and not even totally then. Capacities, then, cannot “be developed” as such; they can be encouraged, guided and facilitated and, where care is taken to meet certain best-practice conditions, may very effectively develop from within.”²

Many factors influenced participants on their journey to increasing their own agency regarding capacity development. These included the cohort format, venue selection, face-to-face and virtual meetings, cohort member involvement in program design and content, and facilitation processes.

GFC refers to organizations it supports as a group in funded initiatives as a “cohort.” Members of the two Step Up cohorts derived their own understandings of the term. In their definitions, they used the words *learning, exchanging, inspiring, encouraging platform, fellowship, pathway, and community of practice*. They observed that the cohort had a deeper, more intense level of engagement than is usual in traditional networks and other groups they had joined.

One participant concluded that a cohort “considers itself as a group, and develops relationships amongst members who genuinely want to work with each other and define the area of their work.” Participants felt that the “main essence [of the cohort] is a place where people can be fearless about learning and sharing mistakes they have done, asking critical questions.” Many noted that empathy, emotional connection and openness, and care were preconditions necessary for sharing. “One has to experience it to discover it. If a group is made on empathy, it has a bigger impact on the person and the society.”



Step Up cohort two members and girls in FICH's programs exchange experiences.

Value of experiential learning

Step Up facilitators intentionally situated in-person learning activities in the contexts of participating organizations. This allowed the host organizations to share their work in a vivid and immediate way and solicit feedback and observations. Activities outside of the formal workshop setting included visits and discussions to host organizations, engagement with program participants, visits with community members, and discussions and informal exchange with other civil society representatives in different contexts. In his final review of cohort one activities, co-facilitator Roger Ricafort noted, “the different locations of the three face-to-face workshops also provided variety and novelty, as well as opportunities for comparing and contrasting different working contexts and environments of the different participating (host) organisations.”

² A.K. Bernard, *Adult Learning and Capacity Development in IDRC: A Concept Paper* (2005), <https://idl-bnc-idrc.dspacedirect.org/bitstream/handle/10625/47537/IDL-47537.pdf?sequence=1>.

In cohort one, participants visited night schools and elementary school classrooms in India, sites of life skills and vocational training for refugee girls in Kenya, and an informal settlement for the Dom community and Syrian refugees in Beirut. Cohort two participants immersed themselves in Delhi, engaging with young women community leaders and later interacted with high school girls and rural communities in northern Uganda.

A few participants navigated discomfort with visits to rural communities during one convening, and explored why they felt they were encroaching on community space, like “development tourists,” while most participants appreciated the opportunity for learning visits with program participants, and in some cases, other community members. Processing and reflecting on each visit was an important step following these experiences. “We did not study by a book but actually visited the communities. It was not limited to virtual. We could have got, say, 10% of the benefit if we met in a conference in New York [rather than having site visits],” noted one participant. The host teams reported that during certain learning visits it was valuable for community members to converse with people from other countries who were interested in their lives.

Almost all respondents commented on the effect the venues for the convenings had on group dynamics. Choice of environment influenced the tenor of the meetings with a sharp contrast in the second cohort between meeting in a hotel in frenetic Delhi to a residential space in rural Uganda that required travel from the arrival point to the convening site. One participant recounted: “We were prepared for long road travel, which forced us to talk to each other. These subtle ways of being with each other created a certain kind of bond.” The choice of site also took away from external distractions where the participants could relate to each other more while at the same time having the chance to engage more with the local context.

Virtual and face-to-face modalities

Many participants concluded that Step Up’s hybrid model, combining online and in-person meetings, was very effective. At the same time, all participants felt that the impact of face-to-face meetings was much greater than that of virtual interactions. “When we went to Uganda we realized how important face-to-face was for self-reflection and learning,” observed one participant, for whom this was the first face-to-face meeting with the cohort. Another noted: “One can have knowledge exchange in virtual meetings and perhaps some deep conversations, but if the purpose is building deeper and longer lasting relationships then it cannot replace face-to-face connections.”

In cohort one, GFC tried to deliver content over virtual meetings, with topics chosen by the participants. The team could cover only limited content in the course of one hour; also, what excited participants was the process of sharing with one another. With this in mind, GFC moved from delivering content in virtual meetings to bringing people together. In cohort two, participants shaped the agenda with some calls focused on members presenting their work and seeking feedback.

Because of the strong bond that emerged during the in-person convenings of the second cohort, the virtual meetings that followed them reflected more energy in organizational and personal exchanges. Although virtual interactions were not a substitute for those that took place in person, they contributed to creating familiarity and ease, as well as discussions of emerging issues and challenges such as closing civic spaces and adaptations in response to COVID-19. In fact, following changes brought about by COVID-19, the second cohort connected every two weeks for a period of time serving as a support group as leaders grappled with adapting their work in a situation different than any had encountered.

Nothing about us without us: Involvement of cohort members in program design

According to adult learning principles, capacity development activities are more successful when participants are included in determining learning content and why it is relevant. To avoid directing the agenda, GFC aimed to strike a balance between providing technical inputs and serving a facilitation role. Programming drew heavily on participatory methodology, rather than trying to pack “teaching” content in prescriptive fashion.

Recognizing that participants had already attended multiple skills training and courses, and what they needed was an open space to reflect as leaders, GFC invited cohort partners to be the primary sources of ideas to help shape their own learning. This way, content could emerge from the participants’ experiences. One participant noted: “Capacity development process was not about transmitting information or recipes about how things should be done. It was oriented towards making us think about our own practice and how to learn from it.” Facilitators also used case studies involving actual challenges participants were facing. Case studies, which preserved anonymity, invited greater participation and thus allowed group members to apply lessons learned to their own situations.

Journey is as important as the destination

While Step Up had objectives, participants were not pushed to achieve these in a linear, formulaic way but encouraged to view the process of critical reflection as a pathway toward strengthened capacity. “We were not pushed to find solutions; this gave us time to reflect more,” observed one cohort member. Step Up participants were not pushed to produce a specific result, but expected to make a shift in their own thinking. “As we had freedom,” one participant notes, “we were doing more.” This facilitated their deep involvement in the process: they internalized the Step Up discussions, had time to reflect, and integrated their learning into their organizations, leading to organizational changes. One participant reflected: “I see Step Up was a pathway because it never told us what we were doing wrong and what we can do alternatively. All organizations were established and had systems in place – staff, HR etc. We had conversations on how these systems function and what could be an alternative design. Not to tell us what to do but for us to think maybe there are things you are missing.”



Cohort two members use drama to demonstrate power dynamics between organizations, communities, and donors.

Creating space to encourage relationships amongst participants without strong expectations of what the result will look like, leaving learning open-ended, creates the flexibility to see what emerges through relationships and sharing. “We were like bread which is baking,” one participant reflected. Relationships and bonding were valued more than focusing on a particular outcome statement; organizational pieces came together organically. Learning evolved organically, nourished by the facilitators’ attitude that they were there to learn from and listen to participants in a non-judgmental way, trusting the partners’ wisdom.

Step Up facilitators played an important role in providing the venue for participants to share ideas, knowledge, and experience, rather than trying to provide ready-made solutions. Facilitators demonstrated faith in the cohort process by giving participants the requisite time and interactive opportunities to live into that faith and “try on” new approaches. This engendered “safe space,” collective ownership of the co-learning process, and a commensurate sense of

accountability. When problems arose within convenings, cohort members worked together to resolve them, rather than looking to GFC as a source of solutions. Taking responsibility for problem-solving and power sharing is another marker of participants' developing capacity.

Sparking Transformative Changes in Individuals and Organizations

Any learning program is ultimately about facilitating change. Step Up endeavoured to facilitate these change processes at the individual and organizational levels. Through the lifespan of the program, this evolved from an initial more traditional organizational development focus to being inclusive of broader and deeper levels of transformation. The following are examples of some of these changes as recounted by the respondents in their interviews.

Changes in Individual Participants

Several respondents reported changes in their personal lives like realizing their own potential and more collaborative elements in their relationships. Several respondents mentioned the importance of work-life balance for themselves and their staff: "It is about us, it is not only about the organization. I learned to say 'no' to working in the evenings. I'll do it when required, but it is not a rule for me anymore." Participants also reported increased attention to wellbeing and collective care, also mentioning the positive effects of the relationships with other members of the cohort.

"Leadership is a process, I learned. For leaders, as much as it is difficult, be open to your own learning."

Recognizing one's role as a leader

Step Up provided the participants a platform to engage with other leaders. While networks are usually oriented towards specific objectives such as advocacy or capacity strengthening, Step Up offered a reflective space for senior leadership to share, troubleshoot, and learn with like-minded peers outside of their organization. For some, it was challenging to think about themselves as a leader. Step Up made them feel more comfortable about their roles.

A participant recounted a situation with a troublemaker in the team that was affecting the work. After discussions in the cohort, the leader noted that she felt more ready to handle the situation and let the individual go after conversations with the whole team. She felt that this solution was better for organizational functioning rather than just avoiding conflict. She recounted: "Before Step Up, I did not have a chance to engage with other leaders from similar backgrounds. I feel I am alone. My team thinks I am the leader, but am not able to share with them sometimes. I was trying to refuse the role of leader. I didn't want others to think I am the founder or bossy. I felt more comfortable about my role now. It made me feel I am not alone. I became more confident as a leader. Earlier I was hiding behind the program."

Another participant shared her reflections on leadership after Step Up: "It is about power, about leadership, how to work, not work as leaders but as human beings in the office. A leader has to take on different roles. Then you can avoid some mistakes. I work in the back, my leadership is silent." A different participant shared thoughts about leadership being more than a position and the need to be open to

“The Beauty of Collaboration I Learned from the Cohort”

One leader felt that he was responsible for the organization and had to do everything himself. After Step Up, he started involving other team members to take forward initiatives. The team was able to hold the annual event of the group far better than he could have done alone. His team members have now been mentoring others and mirroring this collaborative style of leadership. Another staff member commented on him: “He always had potential for leadership, but he emerged a stronger leader after Step Up. This idea of leadership, he has transferred it to at least four other people in the organization. He has started to mentor them.”

growth: “Deliberately, I can change. Leadership is a process, I learned. For leaders, as much as it is difficult, be open to your own learning.”

Collaborative approach to leadership: “I don’t have answers for everything”

Step Up challenged the definition of traditional leadership based on hierarchy and authority. Discussions about how to share authority and the decision-making processes in their organizations stimulated reflections amongst participants on their own leadership styles. The opportunity to both give and receive critical inputs eliminated hierarchies and reinforced participants’ valuation of themselves and their peers. This helped them to identify their strengths and realize their responsibility to shift the power to others with their organizations. As one participant noted, “I started discussing: how do we work together efficiently if we would like to make them leaders? How can our organization help them achieve their growth?”

Another said, “I can see a change in my approach and agenda. It’s human to make mistakes; I don’t have answers for everything.” A staff member from the same organization re-iterated this idea: “Her positive leadership skills were enhanced after Step Up. She tells us, please don’t be afraid to take decisions and speak your thoughts and share within the team.”

Participants reported changes in their organizations as a result of developing more collaborative approaches. For example, some observed that staff have learned new skills. An executive director shared examples of staff who were now writing proposals and speaking publicly. With this growth in skills, certain organizations decided to support staff to grow into new roles as opposed to hiring new team members.

The supportive and collaborative relationships between the GFC facilitators in the meetings served as a model for the participants. Moreover, participants were also involved in facilitating sessions in the face-to-face convenings. Co-facilitation helped them understand the importance of “making space for other voices” and power sharing. Some participants were able to transfer these perspectives to their organizations and, in a few instances, to their communities. “Staff themselves can do many things...It is not about controlling staff, it’s about empowering them so that they can perform.”



GFC facilitators, staff, and a member of cohort one meet with youth in Tahaddi's program in Beirut during a convening.

"I have realized that if we strengthen our team, we can take better care of the communities."

Changes in Organizations

Discussions in Step Up triggered the individual organizations to institutionalize some empowering principles. One organization established a task force to consider staff aspirations for personal growth and learning. One leader who previously represented the organization in public spaces now shared the opportunities with many others on staff. This was leading to more learning, responsibility and confidence in the staff.

Strengthening second-line leadership

Six organizations also mentioned examples of building second-line leadership as an empowering practice brought on by Step Up. This is an important achievement as seen in the responses from the review participants as well as organizational development studies, which have found that despite having exceptional founding leaders, systematic second-line leadership development falls short in NGOs. Some members of the cohort are taking this issue head on.

Many of the organizations gave the message to the second line that the organization will invest in building their leadership. This increased investment in the next level of leaders in the organization prompting them to take on roles beyond boundaries of the formal role. Further, Step Up meetings built confidence in participants, particularly second level leaders, as one noted, "There are spaces in Step Up to express ourselves. No one's experience is better than the other...it made me more confident." The presence of two representatives from each organization in the second cohort also helped build trust and understanding. A senior staff respondent said he "...became open about what she (the executive director) thought. It was unique (as) we critiqued our organization...My trust in her has grown."

Participants reported several changes as staff beyond the senior leadership level developed increased confidence. Some observed that staff are more open, trust within teams is stronger with people more willing to share different opinions. One second-line leader noted that in earlier staff meetings she was shy to share her opinions, but this has changed, and she is giving her honest opinions on organizational matters more openly.

Shifts in organizational policies and systems

Step Up stimulated a process of collaborative decision making, coaching and co-leadership in the participants. These efforts have also prompted shifts in policies and systems for some as they aimed to operationalize the concepts they brought from Step Up in their own organizations. A planning exercise on the topic of human resources in the first cohort, for instance, helped organization heads to consider their structure and streamline roles and responsibilities to give the second-line staff a space to

grow. Other organizations developed policies on inclusion, gender, and child safeguarding in order to better reflect and uphold values and strengthen systems.

Several organizations revised their current human resource practices. For instance, an organization realized the importance of recruiting staff who are motivated by shared values. “We noticed this in organizations in Lebanon and Kenya [during convening site visits], which confirmed that we are on the right track.” Another organization reconsidered their existing grievance and redress policies and reshaped them with a new perspective. These policy shifts signal stronger and more empowered staff as they raise issues with their management teams and become more concerned about humanizing systems and the need to uphold values of empathy within the organization. One organization has incorporated participatory planning in its workplace. Conversations around diversity and inclusion seemed to have a deep effect on the participants related to the importance of different opinions. One participant shared: “I try to be more conscious in my speaking and working; the cohort meeting helped me in this unlearning. We are different; what is good for me, but not for others.” These changes signal a shifting power lens as organizations try to ensure their practices reflect the diversity of voices and perspectives that shape them.

Wellbeing and collective care: “How can we combine ourselves and our work?”

Step Up deliberations provided participants an understanding that caring for staff is an important part of the work. Many of the organization heads had previously not considered these ideas about wellbeing. Participants underlined that leadership should model wellbeing practices: “Team is passionate and works longer hours, but as a leader I am saying take it easy,” one participant reflected. “The team feels valued when they know we are not pushing them a lot.” This is particularly important, said the participants, with increasingly restrictive government policies affecting NGOs, reduced funding, and pressure to perform. In this context, organizations can be a safe harbor for individuals that extends beyond the staff. “I have realized that if we strengthen our team, we can take better care of the communities,” observed a senior staff member.

Participants mentioned specific wellbeing practices they instituted in their organizations since being part of Step Up: leadership modeling more consistent work-life balance; implementing days without meetings or video calls; peer support groups for work-related issues and fun activities; gratitude messages, and a general effort from leaders to strengthen more personal relationships and bonds with their teams. Some organizations reported that these changes strengthened the team spirit, in turn contributing to higher productivity, better time management and a more positive outlook. “My colleagues are happy because we have a healthier working atmosphere with more smiles,” observed one participant.

Quantitative Indicators of Growth and Change

The primary objective of the Step Up initiative was to enhance organizational capacities toward better addressing the needs of youth and children in the partners’ communities. While the changes are best narrated through the stories of transformation shared throughout this review, certain quantitative indicators provide one view of the Step Up partners’ evolution.

The growth in the organizations involved in the Step Up initiative was undeniable. Step Up partners experienced noteworthy success in growing their annual budget. Overall, the average growth in budget is nearly \$820,000 with an average percentage growth of 108%. Five partners more than doubled their baseline annual budget. Across the program period, the 12 Step Up partners raised a total of \$14,232,273. The partners’ fundraising success directly contributed to the increase in annual budget. Together, two indicators – the budget growth and new funds raised – reflect partners’ sustained fiscal growth throughout

the initiative. The numbers of children and youth served during the same period had significant growth as well with an average increase of 421% across the 12 organizations.



Cohort two members lead energetic group activities.

Even more interesting than the amount of funds raised, more than 60% of partners report utilizing these resources to launch new and innovative programs. This last trend shows a willingness to expand their reach to address emerging issues (e.g., safe migration, psychosocial wellbeing, or healthy masculinities and feminist leadership) and/or create collective interventions aimed at achieving systemic change in their regions (e.g., pushing for broader educational reform, or developing a policy research, advocacy and national networking unit). The partners' innovative use of their newfound funding capacity has enabled them to reach more children and youth in their communities.

Across both cohorts in the Step Up initiative, another clear sign of growth has been a significant increase in the number of children and youth served. While this measure tells only one part of the larger story of an organization's journey toward transformative change, it gives some information about their reach. The expansion in programmatic issues, adoption of new methodologies employed, and scaling to new communities has naturally led to a corresponding growth in their reach. Some organizations have experienced large shifts in the number of children and youth served as result of new programs or expanding current programs into new communities. Many organizations started to target more advocacy-oriented campaigns and youth trainings. Some increase in the numbers served has also been the result of engagement in emergency services implemented during the pandemic. Perhaps the only outlier is the decrease in numbers in one organization, which shifted its focus toward more regional advocacy efforts and limited its direct program services due to COVID-19. In this case, the decrease in numbers does not tell the full story without understanding how their interventions have expanded toward more systemic changes.

Ripple Effect on Communities: Walking in the Same Shoes

The ultimate intention of capacity development activities is that changes in organizations have an effect on programming and interaction with communities, although the direct link is often hard to trace. Several Step Up participants reported that individual and organizational changes had a ripple effect in how they worked with their communities, and in particular, how they viewed shifting more power and autonomy to these groups.

Discussions around program implementation were helpful in understanding power dynamics between the organizations and their constituencies. A discussion on youth engagement in governance during a convening addressed how organizations were listening to and involving youth and communities. Several organizations mentioned that this conversation influenced changes in how they engage communities. Two participants from different cohorts said that they were inspired by how the organizations they visited engaged with youth and were trying to institutionalize these within their own organizations. "Ownership of community is important and is central," one participant noted. "Internal processes of the office have to be facilitated along with external processes; we have to walk in the same shoes."

There is a shift from just being involved in youth issues to focusing on youth leadership and accountability to communities. “We don’t want to do charity, we want people to make changes. Giving a computer to youth is not enough; we need deeper changes in the society,” said one participant. Organizations were engaged with youth before Step Up, but the program encouraged them to intensify their efforts, putting more premium on internal power shifting to community ownership and accountability.

Several other pieces of anecdotal evidence of participants identifying how their work with communities has shifted with learnings and experiences from Step Up emerged: For example, one partner adopted Step Up principles of flexibility, adaptability and experiential learning with community groups and assisted them to self-define their needs and resources. Prompted by Step Up, a partner conducted a community survey through which communities said that they wanted a closer physical presence of the staff. The partner relocated their office building to heed this request and have a closer relationship with the community. “Earlier, communities were waiting for us (to tell them what to do), now they have a voice,” commented a senior staff member. Another group incorporated community collaboration as a component of their night school program as a step towards achieving sustainability for the program.

Tensions can arise when an organization’s project priority does not match with what the community wants. A Step Up partner shared an example in which the community had been resisting a training the group wanted to conduct. The partner mirrored the strategy used by GFC during Step Up to strike a balance between the organization and community needs. The partner engaged the community to discuss and agree upon a solution together.

Step Up has encouraged groups to be more accepting of diverse thinking and opinions. This has helped them in dealing with community groups, which have different needs. The engagement strategy a few employed after Step Up has been to explicitly show community groups that diverse ideas have value and potential, and that these should be used to drive community members to find their own solutions and solve their problems. Many groups have also taken to using more facilitative approaches in their communities. One organization, for instance, has introduced a reflection practice with the girls they work with. For another group, the idea of a Youth Council as an advisory board surfaced a few years ago, but the more recent inputs from Step Up and GFC catalyzed a formal launch of the youth council.

From Teacher to Facilitator

A second-line leader who took on a greater role in her organization after Step Up realized the importance of facilitation. In her work with girls, she started to focus more on asking questions rather than providing answers. In solving their personal problems, they now “think” in pairs and also share perspectives with others: “I had a facilitator’s manual, but I became sometimes rigid. Girls have become open-minded in learning. They always look at the facilitator for the right answer. However, if I work in a participatory way by asking questions, it opens their mind to think more, and they develop critical thinking. This has led to improved academic performance in schools. We now have academic results to prove this.”

Transformative Collaboration Between Partner Organizations

Collaborative thinking and, in some cases, actualized formal partnerships, were directly seeded by Step Up’s facilitation, structure, and environment. The provision of a “safe space,” in which respectful dialogue flourished and judgmental evaluations were supplanted by productive questioning and critique, made it

possible for cohort members to share stories about their struggles and perceived failures, as well as successes. As cohort members got to know each other during in-person convenings, they were receptive to gleaning advice and ideas given directly to them by peers with whom they had developed warm, sustaining relationships, who clearly valued them as co-learners. These relationships themselves were important outcomes of the Step Up experience.



Cohort two and a group of high school girls celebrate the FICH and Onda collaboration with a rousing soccer match.

The strength of connections, particularly for the second cohort, proved to be especially welcome as a source of mutual support during the initial phase of the COVID-19 pandemic. Step Up virtual calls during the COVID-19 pandemic helped the cohort members overcome their initial panic and the fear of being on a new, shaky ground where they knew very little and nothing was “business as usual.” The pandemic made the virtual calls more important as a platform for sharing and reflection from March to July 2020, soon after the Uganda convening for the second cohort. Peer support helped members adapt to working virtually. Since the outbreak had occurred earlier in Hong Kong than in other countries represented in cohort two, the Hong Kong team shared its experience of COVID-19 adaptations.

Two examples of organic, formal collaboration between organizations are relevant: The Pop No’j collaboration with Arpan brought learning materials on preventing child

sexual abuse (CSA) to Guatemala from India. The materials were adapted and translated into indigenous languages to be more appropriate to the context of Pop Noj’s work and served as an opening point for them to be able to expand their work on CSA where it previously did not exist. Leaders at FICH in Uganda and Onda Solidaria in Brazil built a powerful connection that has influenced both organizations. Onda spent time with FICH and their communities prior to the convening in Uganda, brought soccer materials for young people, and guided FICH to introduce soccer into their programming for girls. The leadership at Onda in turn was influenced by the experience in Africa and is motivated to strengthen ties with Africa among the youth in their programs, many of whom are Afro-descendants. Youth from communities that both organizations work with have connected virtually to share their experiences. The groups mentioned above received small grants from GFC to further the collaboration that emerged from their relationships. FICH and Asylum Protection Center in Serbia also received a collaboration grant, yet their connection did not flourish. While it was partially due to COVID-19 and other programmatic shifts, leaders of the two organizations were from different cohorts and had never met in person so the foundation for a personal relationship was not established.

Step Up and the Challenge of COVID-19

Step Up discussions around flexibility to adaptive management were important when the cohort had to confront the restrictions beginning in early 2020. Sessions had prepared the teams on how to deal better with being more empathetic to staff and ensure multiple people have a say in the emerging adaptive shifts in their organizations. It helped them to reflect on what was happening and address emerging issues by reaching out to each other and taking care of staff wellbeing and safety. “[Even in the most] unprepared situation, we were able to deal with it in a slightly better manner by trying to understand what the team wanted,” noted one of the participants. Another organization adapted to COVID-19 by trying out new strategies like crowdfunding and virtual partnerships. Step Up had built enough confidence in its

participants, which proved crucial, as they were able to be more nimble in their approach to the emerging crisis.

Part 3: Transformative Organizations: Funding Relationships, Flexibility and a Holistic Approach to Organizational Sustainability

Reflecting on Funding Relationships

Step Up had two layers of funding relationships. The first was between the anonymous funder supporting Step Up as a donor to GFC, and the second was between GFC and the partner organizations in the cohorts. The development of the relationships between these parties had impacts on the conduct and success of Step Up. The trusting and open relationships between the GFC facilitators and the cohort partners influenced the confidence of cohort partners toward adapting and experimenting. Even as the GFC staff saw the funds as restricted in the sense that they aimed to address organizational development dimensions and required broad activity plans, the partners saw these as flexible funds. One partner reported: “GFC helped build capacities; no one wants to invest, but they want professional organizations. GFC helped us fund what doesn’t get funded. We have corpus and are able to tide through these times.”

The reviewer believes that the partners were referring to the flexibility that GFC had in allowing for changes in the previously agreed plans if they were not working or if there were unforeseen challenges. In this sense, both parties could agree to change plans and activities. In fact, 10 out of the 12 partners significantly changed their use of grants during the lifetime of the project. The GFC facilitator responsible for the grants said: “We were able to shift and adapt together because we were very open to each other about what was working and what was not. We also were open about our limitations and expectations. This, along with a deeper understanding of the organizational contexts themselves, allowed for a relationship that had the benefit of the communities they served at heart.” This minimized the power dynamic that might have fostered only compliance, and opened the way for more experimentation.

Because of a seeming miscommunication of expectations at the onset of the project between GFC and the funder supporting the work, Step Up initially focused on fundraising as the key component in the capacity development initiative. Through the life of the project, and because of the invited participation of the GFC’s funder in vital stages of the project and regular communication, and new leadership at GFC with a fresh perspective, this focus gradually shifted to a broader perspective on organizational and leadership development. This reveals the importance of a similarly trusting relationship between the foundation supporting the work and GFC that paves the way for a ripple effect to facilitate innovation in the actual work of partners on the ground.

These examples show the importance of minimizing the inherent power in the funding relationship to allow more space for innovation and experimentation. Regular communication, deeper knowledge about the context of the partner, and an open mind about how to handle certain situations builds good relationships that translate into better collaboration and programs.

Balancing the power: Donors as partners

Participants shared that Step Up brought the realization that community-led organizations should be equal partners to funders. This shift boosted their confidence in negotiation despite differences in opinions and positions. Some participants said that they continue to advocate for flexible funding with funding agencies

other than GFC. One partner noted that a funder has agreed for a part of their current funding to be flexible. The point made was that flexible funding allows organizations to be more responsive to the actual and emerging needs of their communities. Respondents highlighted that GFC funding has always been flexible and this has allowed them to allocate resources as needed in the moment, without necessarily compromising accountability. Some respondents also highlighted that GFC, as a donor, engaged them in a closer and mutually respectful relationship. This was seen more clearly in their engagement with the GFC facilitators of the Step Up program, whom they considered to be peers and co-learners and not “teachers or technical experts.”

The message they got from Step Up was that complex situations demand innovative solutions, and this encouraged organizations to experiment with new approaches and to adapt and learn from failures. This process gave them confidence to engage other funders and assert that freedom to allow failures nurtures innovation. In this vein, one participant shared: “We allowed failure and tried different things and found our solution. I am personally afraid about failure but discussion [in Step Up] said that we have to adapt from our failures. We also communicated this to our other funders that we have to try new things and fail and try again. It gave me more confidence to educate other funders because we want to improve.”



Cohort one members interact with participants in RefuSHE's programs in Nairobi.

Journey from fundraising to a holistic view of organizational sustainability

The original Step Up proposal focused on organizational sustainability with the assumption that fundraising was the primary proficiency that organizations needed in order to prosper. At this early stage, the framework included language specifically around fundraising, scaling and replication. However, after conducting a training needs assessment at the start of the project, GFC decided to expand to a framework with three pillars: People, Resources and Programs. This broadened the scope of the vision, but still focused specifically on fundraising as the principle need and did not take a holistic framework to connect the three pillars. As

a result, cohort one's grant component focused specifically on financial growth and the hiring of fundraising staff. Soon, GFC realized that for organizations to grow in sustainability, they would need to address a diversity of factors that go beyond only the financial aspects. These three pillars were later replaced by the Transformative Leadership Framework mentioned earlier in this document, which became the de-facto guiding line after the first convening of cohort one.

As for specific actions around fundraising, six organizations hired fundraising officers, while the others found it challenging to find fundraising staff or consultants that both shared their organizational missions as well as had required fundraising skills. These organizations innovated by trying to build fundraising skills in other staff, engaged their communities in raising organizational funds, or improved their organizational missions and strategies to become more easily communicated to donors. Organizations began to think about how to access more sustainable funding in a way that closely tied their fundraising strategies with their overall organizational strategies. “Donors come and go, but we need to build social networks and support circles,” noted one Step Up leader whose organization set up a fundraising unit, moved to online fundraising, and reached out to former donors and volunteers to revive social support. One partner reported: “The idea of expanding fundraising options and relying on our own strengths and initiative was something we got from Step Up.”

Allotting funds to other aspects of organizational development, which have the potential to help in fundraising was another important practice carried out by Step Up partners. The underlying rationale was that the more effective their programs were, the more naturally attractive they will be for funders. For example, three organizations hired organizational development experts to improve leadership and coordination skills. Two organizations focused on improving communication and visibility, while one partner opened a new publications section, recreated marketing material, conducted campaigns, and upgraded their website and social media accounts, integrating new ways to share results, such as adding videos. Some partners realized that they could not always rely on external funding, and experimented with social enterprise. This prompted initiatives like selling community products and founding a bakery that engages community members, so they may help to support their own needs. Some organizations noted that involving the youth of their communities in fundraising also builds the capacity of these communities.

Participants also realized that fundraising is more than proposal writing. It also includes envisioning where the organization is heading, how it thinks about contributing to social change, and figuring out ways to reach other organizations. Step Up improved thinking about developing staff capacity as a component of fundraising and inspired a better understanding of their work. This helps them to present their work to funders with greater clarity.

Iterative Learning and Action Between GFC and Step Up

GFC aims to find out what matters most to its partners and the young people they serve, and it supports them with a combination of flexible funding and capacity development services for them to realize their goals of transformational change. GFC itself was in transition over the period of the Step Up initiative, evolving to get better at its work. This was the context that Step Up was conceived in, as a pilot to try out the new thinking and methodologies emerging in practice, while at the same time serving as a space to learn from and improve GFC's approaches and ways of working. Step Up provided these inputs on capacity development as an approach, as well as the specific role of funds and funding relationships in partnerships and social change.

Experimenting through the Step Up processes helped to crystallize GFC's broader approach to capacity development. The role of Step Up's lead facilitator expanded during the project period to encompass a broader role as GFC's Capacity Development Advisor. In collaboration with senior leadership and program staff at GFC, this advisor articulated a capacity development framework with guidelines that defined the broad values and approaches the GFC team would use as a reference for their partner engagement. Most notably, this framework defined GFC's role as a facilitator, catalyst, and connector and not a trainer or technical expert. "Step Up seemed to be a laboratory for coming up with values which helped us with articulating the theory of what capacity development means to us as an organization," noted a GFC facilitator.

One of the key shifts observed at GFC during this period was a motion away from solely measuring an organization's success based on budget growth or children served toward areas that reflected a group's ability to effect transformative change. These include the alignment of behaviors inside an organization with the external mission, the importance of relationships and wellbeing as a foundation across all aspects of an organization's work, and youth and community ownership of the ultimate outcomes of the change organizations are striving to achieve.

Meanwhile, discussions and experiments within GFC also provided the Step Up initiative with some topic areas to focus on in the cohorts. Some of these were the distinct focus on self-care and wellbeing, youth participation and governance, and even proactively re-aligning Step Up's Transformative Leadership Framework to use the language of power analysis and power shifting to help inform GFC's work with

partners and as an influencer within philanthropy. GFC created a Youth Leadership Council, elected the chair of this council to its Board of Directors during this period, and expanded its own leadership team to include younger staff and fresh perspectives. As Step Up developed within the GFC context, Step Up similarly enriched GFC's practice and approach.

Part 4: Conclusion: “It’s the mortar, not just the bricks, that makes a building robust”

The stories and experiences from Global Fund for Children’s Step Up initiative provide important insights for funders, community organizations, and others engaged in capacity development.



Cohort two members gather in a circle to share stories of leadership and change.

Re-Defining Capacity

Capacity development strategy depends on how one defines “capacity”. Most traditional capacity development literature focuses on knowledge, skills, systems and structures, which are necessary but not sufficient to facilitate transformative organizations and individuals. Skills definitions need to encompass abilities to understand and adapt to complex systems as well as reflect and empathize. Systems and structures should not only address effectiveness and efficiency but also inclusivity, mutual accountability, reflectiveness and adaptivity. This shift away from more technical aspects of capacity should also include thinking on

how individual attitudes, organizational cultures and relationships are also the locus of what we mean by capacity. Step Up has shown that refocusing the content of capacity development initiatives benefits organizations and individuals in a more transformative way. Traditional meanings and measures of “growth,” while still relevant as shown by the figures from the 12 organizations, need to be contextualized and defined by the organizations themselves.

Related to the definition of capacity is the understanding of its “location.” Step Up has shown that the traditional targets of capacity development, the organization, need to expand to target the individual leaders and facilitate their growth as change makers. This refers to both first and second liners as mutually supporting cogs in the organizational wheel.

“Delivering” Capacity

Much of the stories of change in Step Up evolved from the conduct of the initiative, mainly the face-to-face convenings. The main takeaway from the experience was that an engaging, experiential, and contextualized learning environment was better than a top-down training methodology. This is in line with adult learning theories and lends itself to summing up some key principles in undertaking a capacity development initiative.

Learning happens better when the learners are involved in determining what, and how, they will learn. This is especially true in the co-learning mode utilized in Step Up where peers served as the sources of

learning rather than a certified “expert.” This method imparts deep context into the subject matter and becomes experiential rather than simply academic. The inclusivity also results in greater mutual accountability and ownership of the learning. A respondent called it building a “fighting club mentality” with a group of members who shared the same values and sense of purpose, united by their commitment to social change and looking out for one another.



Step Up cohort two and GFC facilitators enjoy the last day of a convening in front of the workshop site in rural Uganda.

The role of a facilitator is key to delivering a program such as Step Up. While knowledge of the context and experiences of the participants is key in guiding the process, the facilitator’s main role is not to teach or impart knowledge, but to help evolve these from the participants themselves. This happens best through a guided but adaptive agenda that highlights facilitated collective and individual reflection. The role of the facilitator, as shown in the Step Up experience, is to hold the space together for the participants.

Establishing a safe space is a critical foundation for learning. There needs to be a trusting, open, and appreciatively critical relationship fostered among the participants if they are going to be able to reflect deeply on their practices, attitudes, and behaviors.

As Step Up utilized the Transformative Leadership Framework as its primary lens, any capacity development initiative should understand that capacity itself is not an end. It is just a means toward positive social change. As such, the “target” of capacity development needs to be equally broad and include perspectives from the individual, the organization, and the group (as in the case of Step Up cohorts) and society in general. The emerging cascade of changes in Step Up reflects this.

Capacity is not build overnight. Capacity building for individual and organizations takes time and needs to be framed as a long-term continuous engagement. Step Up is one of the few initiatives that allowed for this type of capacity development approach to take shape over one and a half years for each cohort. This long-term commitment allowed for a deeper, more contextualized and customized engagement leading to similarly deeper and more transformative changes in individuals and organizations.

Relationships Matter

As reflected in the “Relating” component of the Transformative Leadership Framework, relationship building featured as a specific capacity area in the Step Up cohorts. This complements, or even bridges, the more traditional organizational development areas such as systems and people. Many of the change stories within the participant organizations resulted from a revisiting of roles and relationships that resulted in empowerment for second-line leadership, improving staff wellbeing, creation of spaces for critical discussion of program priorities, among others. At the Step Up cohort level, the close relationships that emerged between the participants led to a critical dialogue sparking reflections about leadership styles and becoming better agents for transforming positive power in their organizations and communities. Focusing on personal connections and stories is foundational for any initiative where one hopes to foster connections and get to know each other not only as representatives of organizations, but as individuals.

A focus on relationship building was the key factor in Step Up's success. Step Up, as an intervention, owes many of its contributions to individual and organizational changes to this focus.

Recommendations

Given the learnings and experiences from the Step Up initiative, the review team feels it appropriate to suggest some ways forward not only for those directly involved in the implementation of this program, but also for the capacity development community at large.

GFC

As GFC is seeking to redefine its role in the development field, Step Up provides some key points for the institution to take forward:

- As both a donor and an implementing organization, continually challenge and re-define what capacity development and partnerships mean at the broad level. Engage and strive to expand donor understanding of capacities.
- Seeing the importance of the role of facilitation emerging from Step Up, invest in facilitation capacities of staff to strengthen the position of GFC as a facilitative organization as one of its core identities.
- View platforms for collective learning, reflection, and co-creation similar to Step Up as one way to deliver projects in the future that include relationship building as both an approach and a goal.
- Mainstream power shifting, transformation, wellbeing, inclusion, and participation as key components to any program.
- Establish common understandings of what capacity means with partners and GFC as new initiatives take shape.
- Expand beyond a focus on organizational level change to include thinking with partners about how to shift power to youth to elevate their voices.
- Embrace tough conversations around what drives mindset changes and cultural shifts, including topics concerning gender.
- Deeply engage facilitators over a long period to contribute to strengthened relationships and an exchange between specific initiatives and organizational change.

Donors

- Seek to understand what capacity is needed with partners, and allow it to be defined by those closest to the work. Traditional indicators of capacity provide an incomplete picture at best.
- Know that the objective of any capacity development initiative is ultimately social transformation, which is different in every context, and every organization will perceive its role differently. While accountability to funders has a role, there is a deep accountability to the wellbeing of youth, children, and communities, and meaningful contributions to sustainable transformation.
- Be part of the movement for global transformative change. If systemic change is to be achieved in the emerging complex world, following old solutions to new problems will not work. Donors need to invest in risk taking and innovation and encourage learning from failure.
- Make funding flexible to allow organizations and communities to use funds as per their needs, which often results in innovations or programming shifts.
- Fund core capacity development work to strengthen organizations, rather than just expecting “perfect organizations with perfect systems.”
- Accompany groups and organizations as partners and facilitators, encouraging the organizations to take a similar role with their communities.

- Employ a cohort approach to funding to build a community of practice and support system for the organizations involved; cohorts from diverse geographies and backgrounds are exposed to navigating in a global environment.
- Foster change in mindsets and behavior through capacity development based on a long-term approach framed by adult learning principles.
- Embrace a model of transformative leadership to equip leaders to deal with complex challenges and adapt to new issues.

NGOs or Community Groups

- Know that shifting power is an important step, including from second line and shared leadership in the organization and further to the communities.
- Strengthen facilitation skills and regular reflection amongst staff and communities to increase shared power and learning.
- Don't be afraid to speak up to partners, including donors, about what communities actually need. Be confident in your work, and involve your team and community members. The power to drive the agenda lies in your combined voices.
- Take control of your own learning. Do not be passive recipients of "trainings." They must ultimately be useful and appropriate to the experiences and context of your organization.
- Experiment and "fall forward." To strive for systemic transformation means finding solutions for complex, novel problems. New solutions cannot come from old formulae, there is a need to experiment, fail, learn, and move forward.

Annex I

Step Up Organizations

Organization	Country	Description of Work
Cohort 1		
ARPAN	India	ARPAN empowers individuals, families, and communities with prevention and intervention skills to combat child sexual abuse while also addressing the psychological, social, and health needs of survivors.
Asylum Protection Center (APC)	Serbia	APC provides legal and psychosocial services and protection to asylum seekers, refugees, displaced persons, migrant youth and unaccompanied minors who are vulnerable to forced migration.
RefuSHE (formerly Heshima Kenya)	Kenya	RefuSHE identifies, protects, and empowers refugee children and youth, especially girls, to become advocates of social change in their communities. The organization offers shelter, education, vocational opportunities, and community outreach services.
Masoom	India	Masoom aims to empower, strengthen, and transform the Indian school system so that children and youth can have increased access to quality education and job opportunities.
Pop No'j	Guatemala	Pop No'j promotes social inclusion and empowerment of indigenous communities in Guatemala. The organizations works with Mayan youth to transform them into community leaders and provides critical services for forcibly returned indigenous youth migrants.
Tahaddi	Lebanon	Tahaddi aims to address the needs of the most vulnerable youth in Lebanon, especially ethnic minorities and migrants, through an integrated set of education programs, healthcare interventions, and counseling services.
Cohort 2		
Chanan Development Association (CDA)	Pakistan	CDA strives to improve the status of youth, especially girls, by promoting equal and active participation in decision-making, policy-making, planning, and management at all levels.
Foundation for Inclusive Community Help (FICH)	Uganda	FICH responds to the needs of rural children and youth, including conflict-affected young people, who were abducted, trafficked, and abused by the Lord's Resistance Army, through

		psychosocial support, second-chance education, job skills training, financial literacy, entrepreneurship initiatives, and life counselling.
Institute for Rural Initiatives (IRI)	Moldova	IRI promotes socio-economic initiatives in rural communities in Moldova. They aim to facilitate development dynamics between rural and urban areas, promote a spirit of social cohesion and civic activism, and improve the quality of education and responsible governance in villages and small towns in the country.
Onda Solidária	Brazil	Onda Solidária promotes social inclusion and youth leadership by offering opportunities in low-income communities and with schools, including a social change hub at an eco-social center in a rural community. Onda also uses sport, especially football, as an entry point to foster positive change for young people.
Teen's Key	Hong Kong	Teen's Key is a women-led organization that empowers young women involved in or vulnerable to the sex industry through outreach, counselling and support, a mentorship program, reproductive health education, and gender awareness training.
YP Foundation (TYPF)	India	TYPF strives to develop young people's feminist and rights-based leadership, ensure their meaningful participation in creating programs and policies and legitimize youth leadership of social change.

Annex 2

Methodology of the Learning Review

This review of Global Fund for Children's Step Up initiative examined: 1) Outcome level changes relating to the GFC Step Up initiative, and 2) Effectiveness of processes and methods employed in the program.

The review process utilized a strength-based lens to consider individual and organizational changes that emerged during and subsequent to participants' involvement in Step Up. The reviewer and various Step Up participants designed the questionnaire using the Transformative Leadership Framework, which served as the guiding principle for the Step Up initiative.

The review was inspired by a most significant change approach to data analysis, placing a premium on the respondents' self-identified changes, in conjunction with documented formal targets, objectives and achievements of individuals, learning cohorts, participating organizations, facilitators, and the primary and intermediary funding agencies.

A participatory methodology attempted to involve Step Up cohort members in the design and analysis processes to respond to collectively identified expectations and further participants' learning.

Phases of the Review

Design

The design phase included discussion and finalization of the review design and data gathering instruments. Two cohort partners, GFC staff, and the Executive Director of the anonymous foundation supporting the work were consulted about both the process and what they hoped to learn from the review. These inputs were considered in finalizing the review process.

Tools and Questionnaire

The primary GFC Step Up facilitator and a member of the senior leadership team at GFC who contributed to the initiative and four members drawn from cohorts one and two contributed to defining the tools and questionnaire.

Data Collection

The learning review combined interviews, document analysis, and focus group discussions (FGDs). The reviewer conducted an online FGD with cohort two, after which a cohort member led an online FGD, in which members of cohorts one and two participated jointly, along with the Executive Director of the anonymous foundation supporting Step Up. In-depth interviews (IDIs) were conducted with 33 persons over Zoom, Skype, WhatsApp, and email. Twenty-nine of these were conducted by the reviewer. Four were conducted by GFC staff and cohort members. Open-ended questions provided space for reflection and individual stories.

Interviewees included:

- Participants from cohorts one and two.
- Staff from partner organizations who had not participated in Step Up (for triangulation and external perspectives).

- Step Up facilitators.
- GFC staff whose roles intersected with Step Up (e.g. program officers).

Data collection took place over a four-month period that began after the conclusion of the Step Up cohort two meetings. Data collection took longer than originally planned, largely as a result of impacts from the COVID-19 pandemic: cohort participants experienced increases in work, pressure to take part in many online calls, and other work/life changes. The reviewer also had to allot more time than initially anticipated for some of the longer interviews, particularly some cohort participant interviews, which were spread over two or three calls that totalled four to five hours. Holding these conversations in stages, rather than in a single in-person conversation, was a function of both geographical distances and the impact of COVID-19.

Data Analysis

The document review and analysis included reports from cohort partner organizations and GFC. On a voluntary basis, Step Up participants were involved in reflecting on and analyzing the data from the data gathering stage. The reviewer conducted two mini-data analysis sessions, one with GFC and one with cohort members. The Executive Director of the anonymous foundation supporting Step Up joined in the cohort meeting. The inclusion of multiple people in the analysis sessions cut reviewer bias. Participants were presented the emerging findings and asked to reflect on the most significant changes. This was followed by a further analysis of the data by a core team of the primary Step Up facilitator and a member of GFC's leadership team, one cohort member, and the reviewer.

Regular "After Experience Reflections" (AERs) of the core team were part of the reflective and participatory design of the review. The core team conducted AERs after each milestone activity in the review process. The reviewer used this feedback to address emergent needs and improve the review process.

The reviewer provided GFC, cohort participants, and other interested stakeholders with periodic written updates on the review process.

Limitations of the Study

The COVID-19 situation prevented face-to-face interviewing. Learning, and behavior changes that result from learning, can take years to manifest. The review included data about changes that occurred in cohort one long after their official participation in the Step Up process ended. Evolving changes in cohort two, which ended more recently, may not all be reflected in the data.

Because more time passed since Step Up's cohort one officially ended, participants from that cohort may remember less, or with less clarity, than participants from cohort two. Language was a limitation for a small number of respondents, although Google Translate, cohort members, and GFC staff helped with respondent interviews.

The reviewer was unable to validate participants' self-reported changes by speaking with other involved stakeholders connected to those changes, such as communities and funding agencies. Although validation might have been possible if in-person visits had been an option, it was beyond the scope of a review that relied upon online communication and phone calls.

Challenge of Attribution

While the review could measure whether or not an intended outcome occurred, it is difficult to determine the full extent to which outcomes were attributable to Step Up. As with any other complex social environment, cohort partners were exposed to multiple external influences. Step Up built on the trust and relationships which participating organizations previously had developed with GFC, in its role as a long-time funder. The cohort partners also were exposed to interventions and training through other funders.

The review recognized that a combination of separate programs may have caused behavior changes in the partners, and therefore it focused on “identifying and analysing the significance of other sources of influence in addition to the project intervention.”³ It then worked to identify the practices Step Up used and their effects on the cohort members.

Trustworthiness: To What Extent Can We Place Confidence in the Findings?

Lincoln and Guba proposed four tenets of trustworthiness - credibility, transferability, dependability, and confirmability.⁴ Prolonged engagement was a feature of this review with multiple points of contact through emails, FGDs and interviews. Data was stored properly, in Dropbox, for future reference and examination. The review triangulated information with multiple data sources including project-related reports and other documents, different categories of respondents, and different methods of data collection. Review included different layers of analysis with partners, GFC, and the core team. Reviewer viewed herself as facilitator and placeholder, to make space for participants' voices, including their reflections regarding their values, roles, and identities.

³ Rick Davies & Jess Dart, *The 'Most Significant Change' (MSC) Technique A Guide to its Use* (2005), https://www.researchgate.net/publication/275409002_The_'Most_Significant_Change'_MSC_Technique_A_Guide_to_Its_Use/link/553bd3b60cf29b5ee4b87d86/download

⁴ Y.S. Lincoln & E.G., *But is it rigorous? Trustworthiness and authenticity in naturalistic evaluation* (*New Directions for Program Evaluation*, 1986), 73-84.