



# SCALING UP, SCALING OUT

WHITE PAPER ON LESSONS FROM GOODWILL OF CENTRAL  
AND SOUTHERN INDIANA AND NURSE-FAMILY PARTNERSHIP



## Authors

### **Roxane White, Ascend Fellow President and Chief Executive Officer Nurse-Family Partnership**

Roxane White was appointed president and chief executive officer of Nurse-Family Partnership (NFP) in November 2014. White spent more than 20 years developing programs in California and Colorado for homeless and runaway youth and first came into contact with NFP through referrals of homeless teen mothers to Invest in Kids. In 2003, White became the executive director of Denver Human Services under Mayor John Hickenlooper. The Denver Department of Human Services was utilizing nurse home visiting as a tool to help families at risk for entering child welfare. In 2009, White became chief of staff to Mayor Hickenlooper, who was elected governor of Colorado in 2010, and continued as the chief of staff in the governor's first term. White worked with the state of Colorado to expand Medicaid referrals to NFP programs and to extensively expand pregnancy prevention programs. White has been recognized widely in Colorado and in California for her commitment to high-risk families and to programs that create lasting impact and two-generation change.

### **Betsy Delgado, Ascend Fellow Vice President, Mission and Education Initiatives Goodwill Industries of Central and Southern Indiana, Inc.**

Named vice president of mission and education initiatives for Goodwill Industries of Central and Southern Indiana in July 2016, Betsy Delgado leads a new division that combines Goodwill's mission and education efforts that help individuals and families across 29 central Indiana counties as they work to improve their lives through access to education, employment, and health services. Delgado joined Goodwill in 2011 as executive director of The Excel Center, Goodwill's high school for adults. In two years, she managed The Excel Center's growth from one site to nine. Promoted to vice president of mission advancement in 2013, Delgado focused on expanding Goodwill's mission to maximize support for and the advancement of individuals and families who engage in two or more of the organization's programs. She oversaw statewide expansion of Nurse-Family Partnership Indiana, the nationally recognized home-visitation program for low-income, first-time mothers, of which Goodwill is the exclusive provider in Indiana.

### **Lori Severens Assistant Director for Leadership and Design Ascend at the Aspen Institute**

Lori Severens manages the Ascend Fellowship, a values-based leadership program for diverse leaders with the vision to ensure the American dream passes from one generation to the next. Severens also oversees Ascend's strategic communications efforts. In addition to her current work on the Ascend Fellowship, she has co-designed and launched two leadership development programs for US and global leaders. Prior to joining Ascend, she worked for more than a decade in international development in Africa, Asia, and the Middle East, where she focused on youth leadership development, communications, climate change, and violence against women. Previously, she also worked for a state-focused public policy think tank with an emphasis on women's economic empowerment. Severens received her BA in history and Spanish from Mary Baldwin College and her MA in international relations and economics from The Johns Hopkins University School of Advanced International Studies.

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## Introduction: Why this paper?

There are multiple definitions for scale that center around the expansion, replication, and adaptation of programs. Generally when talking about scale, the term is used to mean one individual program expanding its own reach to serve additional populations or deepening its current efforts. This article examines the challenges of individual programs working together to scale. The goal of the collaboration described is for each service provider to reach additional families with unique services (**horizontal scale**) while also scaling across programs to ensure that a wider array of services are easily accessible for the family (**vertical scale**).

In this brief, we examine the lessons from a partnership between Goodwill of Central and Southern Indiana and the National Service Office of Nurse-Family Partnership (NFP) — two individual organizations with a global presence. With support from the Aspen Institute, they are working together to scale both vertically and horizontally in order to deliver greater collective impact for families. The initial work has been done in Indianapolis and is a model for further national scale. Together, the organizations are working to achieve collective, effective population change and further two-generation outcomes – outcomes for both children and the adults in their lives.

The ability to scale is a significant issue in the human services field. Extensive efforts are underway and supported by funders and thought leaders (The Aspen Institute, Stanford Center on Innovation, Bridgespan, etc.), which begs the question of why the scaling of evidence-based programs with extensive proof of return on investment is not complete. Three of the many reasons include the following:

- ◆ First, many organizations lack the capacity to scale (infrastructure, local presence, funding, etc) while ensuring model fidelity.
- ◆ Second, perverse incentives to scale exist. Local communities tend to support local innovations even if the evidence of outcomes is less clear. While the funding community encourages and often provides incentives for partnerships, funders struggle to support multiple approaches simultaneously. Agencies will find dollars shrinking when collaborating or not increasing as additional families and communities grow. When scaling together, one grant or contract for fewer resources is frequently preferred to supporting the costs of service and data integration for both organizations. State and federal funds are also important funding streams for partnerships. However, many of those funding streams were designed to serve one part of the family or another. To serve the entire family, NFP and Goodwill® have to braid and

blend health care, education, and workforce funding, addressing a steady stream of obstacles around funding guidelines and definitions.

◆ Third, scaling together requires commitment from multiple levels within the collaborating agencies, from boards of directors to enrollment personnel.

This paper shares lessons learned, practical approaches to scale, and a vision for two-generation solutions to poverty. The end goal is for families to have access to a wider array of evidence-based and evidence-informed supports to exit poverty.

## Background

**Nurse Family Partnership (NFP)** is a maternal and early childhood health program that fosters long-term success for first-time moms, their babies, and society. The program introduces first-time parents to caring maternal and child health nurses. The program has almost 40 years of research and evidence demonstrating outcomes. The goals include healthy pregnancy, knowledgeable and responsible parents, and babies having a healthy start. Multiple studies have proven the cost-effectiveness and long-term outcomes. The National Service Office (NSO) provides assistance to states and/or communities to scale the program, including site selection, program delivery and quality, sustainability, and assistance with program start-up and delivery. The NSO also provides extensive nursing and administrative support for ensuring program quality and model fidelity.

**Goodwill** strives to enhance the dignity and quality of life of individuals and families by helping people reach their full potential through education, skills training, and the power of work. Goodwill meets the needs of all job seekers, including programs for youth, seniors, veterans, and people with disabilities, criminal backgrounds, and other specialized needs. Goodwill of Central and Southern Indiana serves 39 counties surrounding Indianapolis.

Goodwill and Nurse-Family Partnership came together in Indiana because of consumer demand. Implemented in Indiana exclusively by Goodwill, NFP began in Marion County, Indiana in November 2011 and today serves more than 500 families there. The program has expanded to counties such

**Goodwill's Nurse-Family Partnership pairs mothers pregnant with their first child with a registered nurse for ongoing home visits aimed at:**

1. Improving pregnancy outcomes by helping women engage in good preventive health practices, including thorough prenatal care from their healthcare providers, improving their diets, and reducing their use of cigarettes, alcohol, and illegal substances;
2. Improving child health and development by helping parents provide responsible and competent care; and
3. Improving the economic self-sufficiency of the family by helping parents develop a vision for their own future, plan future pregnancies, continue their education, and find work.



When Olivia was pregnant with her first child, a Goodwill Guide told her about Nurse-Family Partnership and the services they offered. Olivia immediately bonded with her nurse, Cindy Hunt, who supported Olivia in achieving a healthy pregnancy and beginning to raise her son, Landon.

After her son was born, Olivia worked with Cindy to overcome postpartum depression and then go back to school. She is now studying for her bachelor's degree in health management. Olivia also established a mentoring program to help other young women, including single mothers coping with postpartum depression and lacking support systems.

as Delaware, Lake, Madison, White, and Tippecanoe, with a capacity to serve more than 1,000 families.

Running alongside NFP in Central Indiana are Goodwill's Excel Centers, which provide adult education and drop-in child care. The mission of The Excel Center is to provide adults the opportunity and support to earn a high school diploma and post-secondary education while developing career paths that offer greater employment and career growth opportunities. Schools "meet students where they are" in their education by providing a flexible structure and supportive relationships to help students manage work, life, and family concerns as they achieve their educational goals.

In addition, Goodwill specializes in the wrap-around economic services that complement the health-focused expertise of NFP. When they are ready, families participating in the home visiting program can further their education at the Excel Center and seek career support through Goodwill. In two sites, NFP nurses are co-located within Excel Centers, making it easy to help parents move forward with their education and maintain an ongoing relationship between families and their nurses. In focus groups elsewhere in the country, NFP parents have said they would value having support continue beyond the two years each parent spends with

their NFP nurse. Goodwill offers the opportunity for longer-term wrap-around support as families build their economic security.

## Results for Children and Families

In 2015, families participating in the Goodwill NFP program achieved the following:

- ◆ 95% of participating infants are fully immunized at age 24 months;
- ◆ 90% are born full term;
- ◆ 91% are born at healthy weight or above (5.5 lbs);
- ◆ 89% of mothers initiated breastfeeding;
- ◆ 33% of moms without a high school diploma earned it while in NFP.

One-third of this group also obtained post-secondary education or certification;

- ◆ At one year post-enrollment, 24% of households have seen an increase in income and benefits;
- ◆ In 2015, 42 NFP clients had job placements at an average rate of \$10.97/hour. 22% were at \$13 hour or greater.

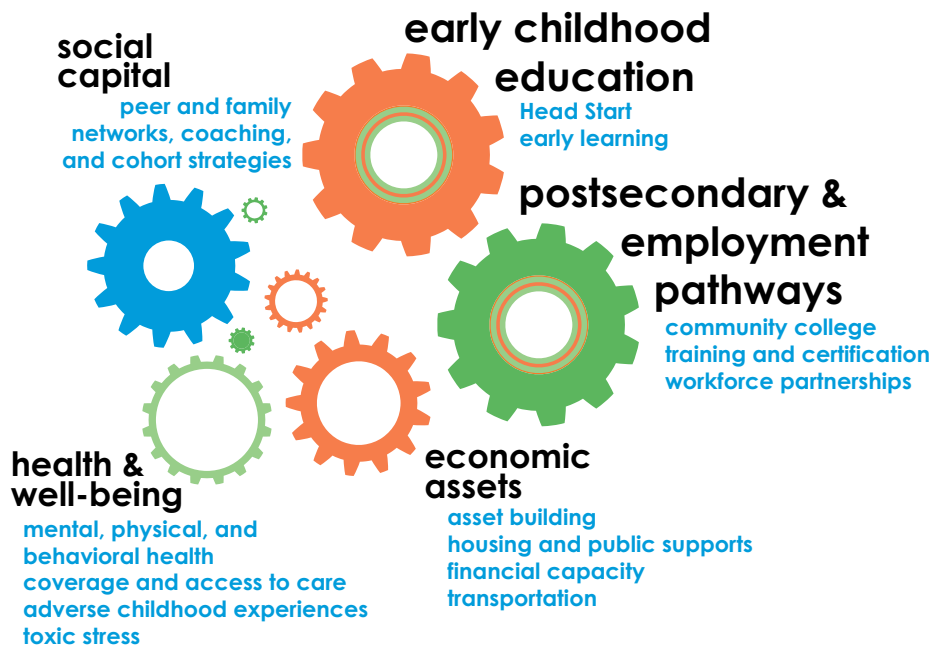
The Goodwill-NFP partnership deepened when two new leaders, Betsy Delgado, Vice-President for Mission and Education Initiatives at Goodwill, and Roxane White, CEO of NFP's National Service Office, became Ascend Fellows at the Aspen Institute in 2015. They engaged in extensive dialogue to think through reaching families. NFP is a model with almost forty years of evidence-based practice that was struggling to scale and meet the emerging needs of families. In most states, home visiting programs serve only 2 - 3 percent of eligible families.

Goodwill represented a mission driven organization with a business perspective and experience in aggressive growth ventures and innovation but without a track record of measuring and being accountable for long-term impact. Together, however, it seemed possible to support a larger number of families, expanding from current capacity of 1,000 in Central and Southern Indiana to 10,000, for example, to create lasting change.

## Serving the whole family: A two-generation approach

The Goodwill-NFP partnership, like all two-generation approaches, seeks to meet the needs of children and the adults in their lives together. At a time when nearly half of America's children (45 percent) live in low-income families, communities need partnerships like this one to help break the cycles of intergenerational poverty that condemn far too many families to lives of struggle where the American dream is out of reach.

Research has documented the impact of a parent's education, economic stability, and overall health on a child's trajectory and the persistence of those effects over time.<sup>1</sup> Similarly children's education and healthy development are powerful catalysts for parents. Aligning systems and funding to support the whole family and their goals offers greater potential for mutually reinforcing and lasting impact across generations. The partnership between NFP and Goodwill of Central Indiana is a powerful example of what a two-generation approach can accomplish.



## Core components of a two-generation approach

Early childhood education, postsecondary and employment pathways, economic assets, health and well-being, and social capital are the core components that create an intergenerational cycle of opportunity for families.

Through their partnership, Goodwill and NFP provide families with opportunities to meet their goals in education, health and well-being, and economic stability. Through shared goals, coordinated services, and a focus on outcomes for children and their parents, they are able to support families holistically, enabling vertical scale that helps families move forward. With this partnership model in place, NFP and Goodwill have looked more closely at opportunities for scale and the lessons from their own work about how to meet the needs of families.

### Principles of Two-Generation Approaches:

- Measure and account for outcomes for both children and their parents;
- Engage and listen to the voices of families;
- Ensure equity;
- Foster innovation and evidence together;
- Align and link systems and funding streams.

## Key components of scaling

Just because a program has a broad evidence base and great return on investment does not mean it will automatically achieve scale. Research shows there are several key components



to scaling, and different ways to do it. Organizations that want to increase their impact need to choose an avenue by which their change will occur. According to Cynthia Coburn in *Rethinking Scale: Moving Beyond Numbers to Deep and Lasting Change*, there are four elements needed to take reform to scale.<sup>2</sup>

**1. Spread:** Growing implementation at new sites and serving a larger number of families.

**2. Depth:** Quality improvement of current services.

**3. Sustainability:** A well-designed infrastructure to provide support to implementers and spread practice improvements.

**4. Shift in Ownership:** Knowledge, expertise, and authority transfer to implementing sites from the original host site.



The first element listed above — **spread** — is at the core of most organizations' efforts to achieve scale. A review of recent research provides some strategies for achieving spread:

- ◆ **Use a distribution network that is already in place.** This requires recruiting and training another organization to deliver a program and may mean giving up information that might be considered proprietary.
- ◆ **Replicate only those components of a program that achieve the most impact.** While this might not achieve all the same outcomes the entire program does, it can still be worthwhile and is often more cost- and time-efficient than attempting to scale an entire program. The goal of scaling is to replicate program results, not necessarily replicate every single strategy.
- ◆ Regardless of the approach to scaling, **there must be a change in attitudes, beliefs, and social norms** to create and sustain change at a transformative level.
- ◆ **All parties must be willing to modify training and support** to meet the needs of the implementing partners.
- ◆ **Build informal, peer-to-peer networks** to achieve transformative scale.
- ◆ **Pay close attention to program recipients**, focus on affordability, and build an operating model that is replicable and not too costly, so it is conducive to scaling.



## Lessons learned from Goodwill–NFP partnerships

In striving for scale, Goodwill and NFP have paid close attention to the elements and strategies above. In addition, they have incorporated the principles of two-generation approaches to achieve better outcomes for children and the adults in their lives. Below we share some of our lessons.

### 1) Spread

Because NFP and Goodwill are two large organizations with multiple business units, beginning to spread required first and foremost alignment around our shared mission and vision. Goodwill was seeking an evidence-based solution to many of the education, health, and employment barriers they were finding in their school, retail, and commercial services operations. For example, they had high percentages of high school students who required special education interventions, parents of those students without a high school diploma, and students and associates with criminal backgrounds.

NFP was working to reach additional families and to ensure that social mobility was an achievable goal. NFP, like Goodwill, identifies economic self-sufficiency through education, employment, and barrier removal as a desired outcome of their program(s). This values alignment was what initially

brought the two organizations together. When Goodwill decided to implement NFP in Indiana, both organizations worked toward the deliberate and practical alignment of NFP family members simultaneously being enrolled in Goodwill education and employment programs.

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*“The partnership complements both strong national brands. Everyone does what they do best, knowing that we need all these pieces to solve this puzzle together.”*

- Benilda Samuels, Nurse-Family Partnership

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“Trust is a big piece of it. So is the desire to be innovative and

creative and try new things. With our eye on a greater vision, that type of thinking about how else we might do things, what we can do better, pushing the envelope — while respecting the critical elements — is hugely important,” said Kimberly Friedman, Chief of Business Development for Nurse-Family Partnership.

Building on that trust and seeking to achieve greater spread, NFP and Goodwill have articulated and are building their capacity to track outcomes jointly for children and the adults in their lives. For the past two years, Goodwill of Central and Southern Indiana has worked with NFP’s National Service Office to improve shared data systems.

- ◆ **Two-Generation Principle at Work:** Measure and account for outcomes for both children and their parents

## 2) Depth

All NFP programs are required to maintain strict fidelity to the NFP model because it has a history of proven results. NFP’s evidence base is unique and highly valued. Fidelity to the model is critical to successfully replicating it. That rigor could have presented itself as a challenge to the Goodwill – NFP partnership given Goodwill’s lack of an institutional focus on health. Instead, the desire of both organizations to strengthen their work and the outcomes they achieve for families has led to greater depth in their partnership. The fact that Goodwill has no other health-related goals means Goodwill – NFP nurses have no competing priorities. They focus only on their NFP clients and their objectives for the families. Dr. Joanne Martin, Director of Nurse-Family Partnership Implementation Planning with Goodwill, said, “Goodwill is the unexpected public health partner, but they really should be the expected public health partner because of what they bring.”

As Benilda Samuels, Chief Marketing Communications Officer for the NSO, said, “The partnership complements both strong national brands. Everyone does what they do best, knowing that we need all these pieces to solve this puzzle together.”

Goodwill Guides, who act as navigators with families, have been an essential element of the partnership. Over the past four years, Goodwill has used Goodwill Guides to help NFP nurses navigate the internal resources of Goodwill as well as the external resources of Indianapolis. By partnering to



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deliver the home visiting program, NFP nurses can focus their time and expertise on health care, while Goodwill Guides help navigate the job market and other economic supports for families. One nurse described the Guides as “walking, talking yellow pages of all the services available.”

Guides use Efforts to Outcomes performance management

software to refer NFP family members to retail employment, education at The Excel Center, and disability services, as well as Talentsource, Goodwill's placement model. The nurses also use the Guides to identify resources outside of Goodwill, like 0-5 education, Women, Infants, and Children Nutrition Services and Child Care and Development Fund, Section 8 housing, etc. Goodwill currently has 79 NFP family members enrolled at The Excel Center, and in 2015, TalentSource and Guides placed 42 family members in jobs.

For NFP partnering with Goodwill has had another unexpected benefit. Goodwill's creative environment, where innovation and 'out of the box' thinking are encouraged, has helped strengthen the program. “A partnership like this offers a window for us to take more risks and get 'what if' back into our vocabulary,” says NFP's Benilda Samuels. The blend of cultures between evidence and innovation has created fertile ground for quality improvement, with ready eyes for where things could be done better while staying true to the critical elements of the program. The larger size of the Central Indiana hub site also enables them some flexibility to test out modifications to see if they can improve their outcomes. Lynn Baldwin, Director of Operations, Nurse-Family Partnership, at Goodwill, said, “The benefit of being a larger site is that we can constantly look at what we can improve, test it, and if it works, implement it...The ability to fine tune practice also helps everyone feel like they are contributing, which helps with retention.”

◆ **Two-Generation Principle at Work:** Foster innovation and evidence together

### 3) Sustainability

At the heart of the partnership's sustainability has been leadership. Goodwill of Central and Southern Indiana continued to strengthen their capacity for alignment with the deliberate creation of the Vice President of Mission Advancement position two years ago. The position unified mission programming under one leadership structure while accelerating collaboration between Goodwill's internal resources. All leaders and direct service providers across Goodwill's mission services now report up through one structure and recognize the strength in collaborating on behalf of their clients.

In late 2014, Nurse-Family Partnership hired a new CEO to lead their aggressive growth goals. It was at this time that Ascend at the Aspen Institute

invited both Goodwill's Vice President of Mission Advancement, Betsy Delgado, and the CEO of Nurse-Family Partnership, Roxane White, to join their second cohort of Ascend Fellows. Roxane White and Betsy Delgado were deliberately selected for the competitive Ascend Fellowship because of the two-generation focus of their partnership, the model's potential for scale, and the vision and tenacity of both leaders. *Kids Count 2014*, published by the Annie E. Casey Foundation, came out around this same time and also highlighted the partnership of these two networks.<sup>3</sup>

The inclusion of these two leaders and their networks in the Ascend Fellowship provided opportunities for deep discussion, analysis, and reflection on how they could best leverage this partnership for two-generation outcomes for families. Goodwill's VP challenged her staff to start focusing more closely on the resources being used by NFP families and the measurable outcomes that were a result of the NFP and Goodwill networks wrapping around these families. Because these two leaders had the opportunity through the Fellowship to spend time building their relationship and discussing two-generation best practice, their approach to vertical and horizontal scale emerged, as did the idea to scale NFP utilizing both networks.

Scaling together led to new challenges, including model fidelity, honesty about challenges in staffing, support, the models, and funding. There are challenges and advantages of combining historical approaches with new ideas. Historical models like NFP with extensive evidence grounded in random control trials do not change quickly. Newer models like the Excel Centers are more likely to look at preliminary data and change based on current consumer needs. Tension is created when staff members desire consistency in approach, evidence, and theories of change.

While both entities may know and understand the strengths and weaknesses of their individual approach, working together requires a depth of honesty and transparency that is likely new to each. A willingness to openly discuss barriers to enrollment, gaps in services, and consumer reaction to services is required. For example, NFP noticed a drop in enrollment in Indianapolis.

Instead of placing Goodwill on a performance plan, NFP evaluated enrollment at the 250 plus agencies throughout the country. Enrollment goals were not being met at several sites, including those in Indiana. To get Goodwill back on track, both programs had to examine their implementation and decide to respond in the short- and long-term.



Goodwill and NFP currently benefit from strong, aligned leadership. However, both organizations have also gone through leadership transitions. Strong teams and relationships at multiple levels in the organizations have helped the partnership weather those transitions, but they have not come without a cost. “When we began our implementation, we were led by a VP who was very committed to and conscious of the fact that the model might be challenged...When there are financial pressures, there are voices in the room who ask, ‘can we cut that corner?’ But we have support, including current leadership, who hold to the model, fight for it, and ask good questions about why,” said Goodwill’s Lisa Crane. Any attempt to scale needs to account for the reality of financial pressures and leadership transitions.

◆ **Two-Generation Principle at Work:** Align and link systems and funding streams

#### 4) Shift in ownership

Relationships at all levels support a strong partnership and the success of the program. Relationships and support are strong from the executive level to program staff and nurses. Staff from both organizations have spent time at each other’s headquarters, and new nurses spend time at the hub office learning the strengths-based culture of the program in addition to their responsibilities. Although Goodwill had never hired nurses before, they knew how to research the job market, bring on the right consultant to help develop the position and mentor new recruits, and attract and retain the best candidates.

Retention is especially important because turnover in nurses leads to client loss. Even with recent nursing shortages in Indiana, the Goodwill-NFP partnership has experienced little turnover, due to the focus on passion and culture in the hiring and training process. As Lisa Crane, Senior Director of Nurse-Family Partnership at Goodwill, said, “We decided early on to look more closely at the passion nurses have for this work and making a difference for the clients they serve. It is easier to train specific skills, but you can’t train for passion or the difficult work NFP is.”

Goodwill and NFP nurses have also built strong relationships with local hospitals, which provide referrals, community organizations, nursing schools, broader nursing community, and other essential community partners. The partnership with Goodwill has helped NFP realize that the solution may not always be in the most obvious partnerships. As they look at different markets with families with different needs, NFP sees more potential pathways than they might have without the Goodwill experience.

◆ **Two-Generation Principles at Work:** Ensure equity, and engage and listen to the voices of families

# Conclusion

Looking ahead, both organizations' national networks and resources offer additional opportunities for horizontal scale of the model to other communities, in Indiana and beyond. Identifying the lessons from Indiana is a first step in understanding what that type of horizontal scale will require. At the same time, neither organization is losing sight of its desire to continue scaling vertically in its current locations, so families have a seamless web of support across all the components required to move firmly onto a path of sustained economic security.

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## Endnotes

<sup>1</sup> See "The Heckman Equation" details and materials. Available at: <http://www.heckmanequation.org>. See also Rolnik, A. and Grunewald, R. (2003). *Early Childhood Development. Economic Development with a High Public Return*. Federal Reserve Bank of Minnesota. Available at: [http://www.minneapolisfed.org/publications\\_papers/pub\\_display.cfm?id=3832](http://www.minneapolisfed.org/publications_papers/pub_display.cfm?id=3832)

<sup>2</sup> Coburn, C. (2003). *Rethinking Scale: Moving Beyond Numbers to Lasting Change*. *Educational Researcher*, Vol. 32, No. 6, pp. 3–12. Available at: <http://www.sesp.northwestern.edu/docs/publications/139042460457c9a8422623f.pdf>

<sup>3</sup> *Creating Opportunity for Families: A Two- Generation Approach*. (2014). Annie E. Casey Foundation. Available at: <http://www.aecf.org/resources/creating-opportunity-for-families/>

**Nurse-Family Partnership**

<http://www.nursefamilypartnership.org>

**Goodwill Industries of Central Indiana, Inc.**

<http://www.goodwillindy.org>

**Ascend at the Aspen Institute**

<http://ascend.aspeninstitute.org>



JANUARY 2017