



## Engaging External Partners: Enhancing impact through expanded expertise

May 2024

### The JPMorgan Chase Challenge

The JPMorgan Chase Challenge seeks to drive equitable and inclusive economic growth by supporting multifaceted initiatives that test and scale innovative, sustainable solutions to advance economic opportunity in communities across the United States.

### The Challenge Collaboratives

Between 2019 and 2022, JPMorgan Chase awarded Challenge grants to 23 collaboratives, or groups of two or more local organizations from among the nonprofit, government, and business sectors.<sup>1</sup> The member organizations in each collaborative work together to deliver programs and services designed to advance the economic well-being of people of color. Collaboratives' focus areas include jobs and skill development, small business expansion, financial health, and neighborhood revitalization. The 2021 and 2022 grant winners focus specifically on fostering wealth building among Black and Latine women,<sup>2</sup> reflecting JPMorgan Chase's focus on ameliorating the disproportionate impacts of COVID-19 on Black and Latine women.

<sup>1</sup> Some 2022 Challenge grant recipients are single organizations, rather than collaboratives. This brief focuses on approaches used by the ten grantees that received awards in 2020 and 2021, all of which were collaboratives. The brief also includes limited examples from the five 2019 collaboratives, whose grants were concluding at the time of writing.

<sup>2</sup> Among collaboratives in the 2021 and 2022 cohorts, engagement has focused on Black and Latine women specifically. The National Evaluation team uses the terms Black and Latine in this brief for consistency in describing the people those collaboratives serve, recognizing that racial/ethnic identity is complex, terms are continuously evolving, and program participants might self-identify using other terms.







In parallel with their programs and services, collaboratives seek to enact systems changes that will create equitable, sustainable practices and policies within their areas of focus. Local evaluators partner with each collaborative to explore the impact of their work and support collaboratives in using data to improve on their efforts.

## About This Brief

As the program’s national evaluator, Abt Global explores common themes arising out of Challenge collaboratives’ initiatives. This brief delves into the varied approaches collaboratives use to engage with people and organizations outside of the collaboratives to deepen their work and be more effective. The report draws on data reported by the 2020 and 2021 collaboratives through Spring 2023.<sup>3</sup> This brief also uses data provided by 2019 collaboratives in interviews at the close of their grants.<sup>4</sup>

This brief starts by describing the creative and strategic approaches three collaboratives have used to engage with people and organizations external to the collaborative member organizations to deepen their work and be more effective, as shown in the table below. The brief closes with reflections about the variety of ways that collaboratives across the 2019, 2020, and 2021 Challenge grant cohorts have tapped the perspectives and expertise available in their communities to help guide and accelerate achievement of their goals.

### Featured Engagement Approaches

Collaborative 	Approach 	Goal 	Early Outcomes and Lessons Learned 
<b>New Orleans Creating Access, Resources, &amp; Equity for Success (NOLA C.A.R.E.S.)</b> , New Orleans, LA	Partnering with Black and Latine women caregivers to drive needed change through participatory action research (PAR).	Together, PAResearchers and NOLA C.A.R.E.S. seek to learn and take <b>collective action</b> to challenge dominating norms, reveal systemic inequities, and drive positive change in their communities.	PAResearch have experienced transformative change in their own lives and identified goals and action steps for the collaborative’s programs and policy change efforts.
<b>Prioritizing Our Women’s Economic Rise (POWER) Collaborative</b> , Baltimore, MD	Partnering with The VPI Firm, a project management and systems change consultant, to facilitate planning and strategy development.	VPI brings its expertise in <b>strategy, facilitation, and capacity building</b> to help the collaborative’s member organizations work together effectively.	VPI has provided structure needed for members to build strong relationships, coordinate efforts, and develop strategic direction for their systems change efforts.

<sup>3</sup> The case studies featuring NOLA C.A.R.E.S., POWER Collaborative, and Rebuild Collaborative synthesize data reported through Spring 2024.

<sup>4</sup> See the appendix for more information on the evaluation methods the National Evaluation team used to develop this brief.



Collaborative 	Approach 	Goal 	Early Outcomes and Lessons Learned 
<b>Rebuild Collaborative</b> , Philadelphia, PA	Engaging service delivery organizations as subcontractors and vendors to expand capabilities and strengthen participant outcomes.	Rebuild Collaborative’s network of external partners increase the collaborative’s <b>capacity to deliver services</b> to people and businesses the collaborative serves.	Rebuild’s partnerships have resulted in strong participant outcomes, enabled necessary program adaptations, and created a network to connect participants with the wider array of available services in the region.

## Key Findings

- Collaboratives participating in the Challenge draw on the expertise of both member organizations and external parties to implement their Challenge grants. This expertise comes in many forms—lived experience, practitioner experience, substantive expertise, and varied types of community- and industry-related experience.
- Specifically, Challenge collaboratives have engaged people with experience facing social inequities and partnered with community organizations, consultants, facilitators, and evaluators.
- These external parties help collaboratives refine their strategies, tailor their services, and align their systems for working together by drawing on their deep knowledge of the needs of people collaboratives serve.



## Case Study: New Orleans Creating Access, Resources, & Equity for Success – Engaging Black and Latine women caregivers in participatory action research

The NOLA C.A.R.E.S. collaborative is a partnership of 12 organizations focused on enhancing financial wellbeing and mobility for Black and Latine/x<sup>5</sup> women early care and education (ECE) providers in New Orleans, LA. Together, collaborative member organizations offer training to childcare providers to receive credentials and offer business coaching, loans, and technical assistance to early learning center owners. Alongside this programming, member organizations advocate for policy change to benefit children and ECE providers. The collaborative leads have made intentional efforts to assemble a group of collaborative member organizations mostly led by Black and/or Latine women. The collaborative is dedicated to engaging and amplifying the voices of Black and Latine women ECE providers to guide its work. Learn more about NOLA C.A.R.E.S. [here](#).

**The Approach.** As part of its commitment to inclusive and community-driven approaches in its work, NOLA C.A.R.E.S. convenes cohorts of program participants to conduct [Participatory Action Research \(PAR\)](#). Known as “Participatory Action Researchers,” or “PAResearchers”, these participants are Black and Latine women ECE providers, parents, and community members.

**The Goal.** Together, PAResearchers and NOLA C.A.R.E.S. seek to learn and take collective action to challenge dominating norms, reveal systemic inequities, and drive positive change in their communities.



Photos courtesy of Ali DeFazio for Ampersand LLC.

<sup>5</sup> Although NOLA C.A.R.E.S. is using the separate terms “Black” and “Latine/x” women when referring to their population of interest, they note that the various intersections of ethnicity and race within the African Diaspora allow for multiple and combined identities (i.e., Latine, Garifuna, Afro-Latine, Caribbean Latine, etc.).



**The Role of PAResearchers in the Collaborative.** PAResearchers study topics that are personally and professionally relevant to their lives. They conduct all stages of research, from developing research questions to collecting and analyzing data to disseminating their findings.

After the PAResearchers complete their research, they develop specific and actionable recommendations to advise the collaborative’s policy advocacy efforts. They also participate in the collaborative’s Research and Policy & Workforce committees, and collaborative members invite them to attend listening sessions.

Key Elements of the Approach.

**Beloved Community, a member organization in the collaborative, provides PAResearchers with comprehensive research training to support their work.**

- Dr. Nnenna Odim—a member of the research team at Beloved Community, a member organization in the collaborative—organizes and facilitates the PAResearcher program. Dr. Odim created and provides PAResearchers with comprehensive PAR training and supports their research efforts as their projects evolve.
- Responding to PAResearchers’ interests, Beloved Community has also convened trainings on policy advocacy, with collaborative members contributing expertise on specific components, such as the legislative process and sharing their own stories of becoming advocates.

Training sessions focus on:

- historical research practices
- sources of knowledge like communal perspectives and diverse academic scholars
- frameworks and approaches to addressing different types of research questions

**PAResearchers organize and host events to celebrate their research and showcase their findings.**

- In June 2023, 12 PAResearchers invited NOLA C.A.R.E.S. collaborative members, community members, and friends and family of the PAResearchers to a showcase event.
- PAResearchers envisioned it as a space where the broader community could come to learn, exchange knowledge, and meet people with shared interests.
- PAResearchers presented on their work, highlighting the multifaceted challenges encountered by Black and Latine women childcare providers and opportunities to address those challenges.

Presentation topics included strategies for:

- enhancing childhood literacy awareness
- supporting the mental health of childcare providers
- launching in-home childcare businesses
- wealth building





**PAResearchers advise NOLA C.A.R.E.S. members and participate in partner-led conferences and programs.**

- PAResearchers provide guidance to policy-focused collaborative members with the goal of bridging the gap in representation of those with lived expertise as caregivers in policy work.
- Collaborative members also have sponsored PAResearchers' participation in partner-led conferences and programs.
- Collaborative members work together to use inclusive meeting practices and practice transparency and accountability by reporting back about their progress related to PAResearchers' recommendations.

**PAResearchers' focus areas shaped the local evaluation plan.** Local evaluator Ampersand LLC developed research questions aligned with focus areas selected by the PAResearchers as part of its priority to follow the guidance and vision of Black and Latine women ECE providers and amplify their priorities in its evaluation work.

## Early Outcomes and Lessons Learned

**PAResearchers successfully complete research projects, engage community members, share their knowledge, and experience transformative changes in their own lives.**

- Thirty-four community members participated in PAR trainings, and PAResearchers completed 26 research projects between July 2022 and October 2023.
- Their projects have engaged 150 community members through interviews or surveys, community events, and online partnerships.
- PAResearchers are actively working to challenge the status quo and foster meaningful progress. PAResearchers aim to produce accessible and conscientious findings that resonate with a wide audience. PAResearchers are currently sharing their knowledge with their own communities, through facilitating workshops and activities and presenting at national and international conferences. When presenting on their work, PAResearchers described their experiences of infusing joy, creativity, and community-building into their research.
- PAResearchers reported that the program has empowered them, given them a sense of purpose, encouraged personal growth, and allowed them to connect with others while making a difference in their community. Many PAResearchers reported that they hope to pursue policy advocacy or offer guidance and support to fellow community members.

*"PAR made me feel empowered, that I have a voice that can make a difference, and I can make a difference for my community. PAR helped me to step outside of my comfort zone, gave me a desire in terms of my education."*

– NOLA C.A.R.E.S. PAResearcher



PAResearchers have helped identify goals and action steps for the collaborative.

- PAResearchers have provided the collaborative with actionable recommendations, such as expanding mental health resources and improving professional development for ECE providers.
- In policy-focused meetings with PAResearchers, collaborative members reported observing PAResearchers speaking up about their recommendations and identifying how the collaborative should move forward.
- NOLA C.A.R.E.S. has employed the insights from PAResearchers to identify discrepancies between the activities undertaken in the Challenge initiative and the PAResearchers' identified priorities.

NOLA C.A.R.E.S. continues to evolve its processes and practices to center the PAResearchers as leaders in the collaborative's work. As PAResearchers and collaborative members engage together on policy change efforts, the collaborative members continue to reflect on how their practices and actions amplify the influence and representation of Black and Latine women. One way the collaborative has worked to strengthen its efforts is by developing a community engagement protocol to clearly lay out practices and accountability processes for engaging Black and Latine women.

*"Having folks come from PAR and participate in these different ways, that is huge and beautiful. To see [a PAResearcher], who is already very accomplished in the field, but who has been through the PAR process, for her to be empowered to speak up more in those policy meetings which I've been attending – really watching PAR folks be interested and contributing to that, not just sharing their voices but as actually being, like, movers of things. That opportunity is, I think, what makes this project just incredibly unique and exciting."*

– NOLA C.A.R.E.S. Collaborative Member

## Case Study: Prioritizing Our Women's Economic Rise Collaborative – Engaging a project management and systems change consultant

The POWER Collaborative is advancing racial justice and financial empowerment through wealth-building, real estate development, and entrepreneurship activities to benefit Black and Latina women in West Baltimore, MD. The collaborative seeks to build wealth and power among currently asset-limited, income-constrained, employed (ALICE) women by providing training, resources, and support to small businesses, workers, and job seekers; offering apprenticeships, training, and financing opportunities in the real estate development field to Black and Latine women; and advocating for equitable real estate and housing policy in the city. Learn more about the POWER collaborative [here](#).





Photo courtesy of the POWER Collaborative.

**The Approach.** The POWER collaborative has engaged The VPI Firm (*Vision, Performance, Impact*) to serve as a strategy and process design consultant to its seven member organizations. VPI's team of five manages the project and advises the collaborative on its systems change efforts.

**The Goal.** VPI brings its expertise in strategy, facilitation, and capacity building and strong connection with the Baltimore City community to help the collaborative's member organizations build strong relationships, facilitate coordination among member organizations, and advise on systems change.

#### ***The Role of VPI in the Collaborative.***

VPI has an ongoing role in managing the collaborative. To do so, VPI works closely with lead organization Latino Economic Development Center (LEDC) and the local evaluation team at the University of Maryland School of Social Work/Financial Social Work Initiative. In addition, VPI advised the collaborative on its systems change work at the beginning of the grant.

#### **Origins of the approach:**

Early in grant planning, the POWER collaborative recognized that coordinating the project and facilitating collaboration among seven member organizations would require skill and capacity, particularly because the organizations were new to working together. To meet this need, it set aside grant funds to hire a consultant, issued a request for proposals, and reviewed and vetted multiple candidates.





## Key Elements of the Approach

VPI provides guidance on strategy and facilitates relationship building among the collaborative members.

- **VPI facilitates monthly group meetings of collaborative member organizations.** Simultaneously, the local evaluation team holds monthly meetings with individual member organizations to discuss progress and identify supports members need.
- **VPI and the partners lean into tension.** Collaboration among seven partners is not straightforward, and VPI and the partners reported that they do not avoid having difficult conversations about the work. The group builds trust and rapport through collaborative meetings and monthly check-ins. They understand that navigating tension is an inherent part of trying to address deeply rooted inequities.
- **During monthly meetings of collaborative members, VPI has facilitated a peer-to-peer thought partnership exercise, which has built affinity within the collaboration.** VPI recognized that each member had already been working in different ways to address inequities affecting upward economic mobility. VPI sought to help the members understand one another's approaches better through facilitated peer-to-peer exercises. In several collaborative meetings, VPI has led this creative activity, asking a team member to share about oneself and describe a challenge they are currently facing, while the other team members practice deep listening, instead of jumping immediately to solutions. Afterwards, VPI has guided the group in providing constructive feedback to address the challenge presented. Member staff reported that the exercise made them feel appreciated and understood. Their personal journeys resonated with one another; they found sharing resources and identifying solutions energizing.
- **VPI created a map of connections among members' services, which helped them align those services.** Using Mural software, VPI created a map showing the services offered by each collaborative member organization and the flow of information among members. VPI and members used the map to discuss hypothetical journeys that participants could take among the members' services to meet specific needs. This generated conversations among collaborative members about how their services interact with one another and how they could best connect their services to create pathways for participants to access services in a logical order.

*"The most valuable lesson learned is when the organizations don't have prior experience working together, it's very important to have a facilitator. We're grateful to have hired VPI, and they put together these monthly meetings and helped us build trust."*

– POWER Collaborative Member  
from Latino Economic  
Development Center

VPI's conducted research on systems change strategies and provided the collaborative with a diagnosis of systemic issues.

- VPI researched and recommended a set of five systems change indicators for the collaborative's work.
- VPI produced four reports to provide a roadmap for the collaborative to begin engaging in policy change efforts related to real estate development in Baltimore City. VPI also shared these reports with the Baltimore City Department of Housing and Community Development for their use.
- VPI also convened a women developer's roundtable to identify inequities and barriers in the city's real estate sector and to develop a set of policy recommendations, which then were presented to the Baltimore City Department of Housing and Community Development.
- To carry out VPI's recommendations, LEDC hired an advocacy specialist, who is using the reports produced by VPI to advocate for policy change at the city level as well as at the state and national levels.

### VPI produced four reports:

- Existing Efforts to Address Barriers to Participation in Real Estate Development Among Black and Latina Developers in Baltimore City
- Review of Policies Governing the Disposition of Real Property & Review of Judicial Policies Governing In Rem Acquisition
- Key Recommendations to Reduce Barriers to Participation in Real Estate Development
- Opportunities for Black and Latina Developers to Collaborate in Removing Barriers to Real Estate Development

## Early Outcomes and Lessons Learned

VPI's expertise has complemented members' expertise and allowed them to focus on service delivery.

- VPI has a set of competencies, including trained facilitators and staff with experience in organizational capacity building, that complements the expertise of the member organizations.
- VPI and LEDC established a clear scope of work from the start. They determined that VPI's role would not be a catchall for all project management tasks. Rather, VPI would focus on strategy, facilitation, and capacity building; LEDC would guide completion of deliverables for the grant.



Photo courtesy of the POWER Collaborative.



- If VPI were not involved, LEDC would have taken on much of the coordination and facilitation work, which would have limited its ability to provide services and likely would have slowed the collaborative's progress.

**VPI has provided the collaborative members with a high-level perspective on their work.** Because its time is not dedicated to day-to-day service delivery, VPI has capacity to guide the overall direction of the collaborative. VPI helps members create a cohesive plan for achieving the collaborative's goals.

**VPI provides consistency and institutional memory for the collaborative.** Staff in partner organizations sometimes turn over during the grant. VPI works with the local evaluation team to record the collaborative's work and keep the collaborative on track in times of turnover. Alongside partners, VPI teaches new staff members about the collaborative's structure, goals, and resources available to partners.

## Case Study: Rebuild Collaborative – Partnering with service providers to build networks of support

Rebuild is a collaborative of three public-private agencies with expansive missions to serve Philadelphia, PA, residents and businesses—PIDC; Philadelphia Works, Inc.; and the City of Philadelphia's Rebuilding Community Infrastructure (Rebuild) initiative.<sup>6</sup> The collaborative is working to advance equitable opportunities and wealth building for people of color and women residents and small business owners in



Photo courtesy of the Rebuild Collaborative.

<sup>6</sup> The Rebuild initiative is a partnership among the Managing Director's Office at the City of Philadelphia, Philadelphia Parks and Recreation, the Free Library of Philadelphia, and the Office of Labor Standards.



Philadelphia. Together, the collaborative member organizations provide workforce development programs intended to prepare workers for union apprenticeships and construction jobs and small business support programs, including financing, to prepare small business owners to bid and carry out public works contracts. The collaborative's work dovetails with the City's Rebuild initiative, which uses funding from the Philadelphia Beverage Tax to revamp the city's parks, recreation centers, and libraries. More information about the Rebuild collaborative is also available [online](#).

---

**The Approach.** The Rebuild collaborative has built a network of external partnerships with Philadelphia organizations. The three Rebuild member organizations lead the vision and strategy for the collaborative, while each partner provides defined services as a subcontractor vendor or under a memorandum of understanding with the collaborative.

**The Goal.** Rebuild collaborative's network of external partners increase the collaborative's capacity to deliver services and ultimately strengthen outcomes for the people and businesses the collaborative serves.

---

**The Roles of Collaborative Member Organizations and External Partners.** The Rebuild member organizations, who together designed the project and applied for the Challenge grant, collaborate on the high-level decision making for the collaborative. In addition, each organization has a specific operational role; they describe the roles as distinct but interwoven and complementary.

Meanwhile, external partner organizations bring specialized skills to the collaborative, and each external partner's mission aligns in some way with the collaborative's overall mission to help Philadelphia residents gain employment, access opportunities, and build their capacity to care for their families.

## Key Elements of the Approach.


**The Rebuild collaborative used a competitive bid process to select some of its external partners for key roles.**

- For example, the collaborative used that process to select Surety Bond Associates to provide small business support, because of the organization's knowledge of the nuanced challenges that people of color and women owners of small businesses experience and its capacity to deliver both technical assistance and financing.
- The collaborative also used the process to identify external partners to serve as funders for the wages and supplies for workforce development training participants.

**The Rebuild collaborative's workforce development external partners deliver training and provide supportive services to program participants alongside the City's Rebuild initiative and Philadelphia Works.**

- Philadelphia Works, a nonprofit that serves as the city's workforce development agency, contracts with





external partners to deliver employment services and training in Philadelphia through PA CareerLink®, a program of the Pennsylvania Department of Labor and Industry.

- Through the partnership between Philadelphia Works and PA CareerLink service providers, the collaborative provides access to a much larger network of services than if the three member organizations alone delivered services.
- Rebuild contracts with Montage Diversity Consultants, which serves as the employer of record for its workforce training programs. Montage Diversity Consultants issues program participants' wages, covers workers' compensation insurance, and provides other supportive services to increase successful program completion, such as steel-toed boots, transportation passes, and entry fees into the various skilled trade unions.
- Staterra Coaching holds a contract with Rebuild to provide executive coaching sessions with workforce development participants. Participants receive conflict resolution and leadership development training during their tenure in the various skilled trade training academies.
- Other partners fill specific training delivery needs, such as Eastern State Penitentiary providing the collaborative with access to a training facility.

### Key external partners:

- Workforce development external partners include the Eastern State Penitentiary, Eastern Atlantic States Regional Council of Carpenters, Pullman Construction, Bricklayers and Allied Craftworkers Local 1, Torrado Construction, Girl Concrete, Premier Restoration, and Windows Restoration & Repair.
- Rebuild has a contractual relationship with Surety Bond Associates, a bonding agent with technical expertise in working with small minority- and woman-owned business enterprises, that provides small business support.

**External partner Surety Bond Associates works with the Rebuild collaborative to facilitate the Rebuild Ready and Emerging Vendors programs.** The Rebuild Ready program provides small Philadelphia-based businesses with information, resources, and technical assistance to prepare them to bid on city projects funded through the City's Rebuild initiative and other capital projects. PIDC, the Rebuild initiative, and Surety Bond Associates collaborate on the [Rebuild Contract Line of Credit \(CLOC\)](#), including hosting webinars, conducting outreach, and coordinating to streamline the funding process. For the Emerging Vendors Program, Surety Bond Associates provides technical assistance to assist diverse Philadelphia-based vendors in obtaining their Minority Business Enterprise (MBE) or Women's Business Enterprise (WBE) certifications by working with the Enterprise Center, Eastern Supplier Minority Council, and Women's Business Enterprise Council.



The collaborative emphasizes clarity, transparency, and inclusivity with external partners.

- Each collaborative member organization serves as a point of connection with specific external partners. The three collaborative members work closely with the external partners to make sure that everyone understands their role, the services they are responsible for providing, and where to refer participants for other services. The memoranda of understanding that the collaborative has established with some external partners have clearly laid out those roles and now serve as models for projects outside of the Challenge grant.
- Members communicate regularly with the external partners to ensure that they have the latest information and updates about the program. The collaborative meets with external partners in person to create a space for partner staff to ask sensitive questions they might not ask via email. For example, though it is not required in its contract, Surety Bond Associates has found joining PIDC's and the Rebuild initiative's biweekly meetings about the Rebuild CLOC to be an effective way for it to address issues and ensure a timely flow of payments to bonded contractors.

### Early Outcomes and Lessons Learned.

The collaborative and its external partners have created a network of support, fostering positive outcomes for program participants and connecting participants with outside services.

- Working with external partners, the Rebuild collaborative has supported Philadelphia residents and small businesses in obtaining the knowledge and skills they need for employment and small business contract opportunities. For example, 39 workforce training participants have entered union apprenticeships in masonry, finishing trades, and carpentry.

### Key outcomes in the three year grant period:

#### Jobs and Skills:

- **88 participants** received jobs and skills services
- **75 participants** completed skilled trades training programs
- **52 participants** were placed into full-time employment, earning \$22.08 hourly wage on average
- **39 participants** were placed in union apprenticeships

#### Small Business Expansion:

- **348 small businesses** were able to access markets, customers, capital, mentors, networks, and/or training through the program
- **\$1,450,000 in loan capital** was deployed among 5 small businesses owned by people of color
- **80% increased** their revenue
- **2 of these businesses** renewed their loans
- **5 small businesses** received \$5,000 mobilization grants
- **51 quality jobs** were created or retained by small businesses





- The collaborative has found that even when participants in Rebuild’s business support programs have not reached an intended outcome, such as securing a contract through the City’s Rebuild initiative, their interim milestones indicate progress. For example, even bidding on a Rebuild public works project, such as a playground rehabilitation, shows a contractor’s capacity to bid and builds their overall capability to bid on future public work projects.
- The collaborative and its external partners have also helped Philadelphia residents and businesses tap into other benefits, including city and state programs for which they might be eligible, such as Unemployment Insurance, state grants, or other specialized technical assistance.
- The collaborative and its external partners seek to share information about these services widely during program offerings and by participants spreading information to their family and friends. The overarching goal is that Philadelphia residents and business owners know where they can access resources they need.

**External partners have helped the Rebuild collaborative pivot and improve its approaches.**

- Working with the local evaluator and external partners, the three members have identified ways to improve services. For example, the collaborative began connecting workforce development participants with the Commonwealth’s PA CareerLink system more quickly to help them start training sooner. The collaborative created smaller training cohorts better aligned to employer needs and timed around opportunities to join unions or obtain sustainable employment opportunities.
- Collaborative members and external partners also adjusted small business programming to help participants increase their “back office” capacity, help businesses learn about the process of becoming a signatory to the union, increase contractors’ ability to obtain bonding, and ensure that businesses receive a steady flow of Contractor Line of Credit payments through a streamlined process.



Photo courtesy of the Rebuild Collaborative.

**External partnerships have been successful because they formalize natural partnerships between organizations.** The Challenge grant created an opportunity to formalize natural partnerships between organizations performing complementary work and that often already had experience working together to achieve shared goals. The Challenge grant enabled the collaborative’s members and external partners to access funding to design, implement, and continually enhance a more cohesive approach to the workflows and processes that had already been in place.

## Closing Reflections

The case studies highlight how three collaboratives have deepened their impact and extended their reach by working with people and organizations external to their member organizations. In addition to these examples, many more Challenge collaboratives report that they too work in partnership with external parties. The following are themes that emerged through our interviews with collaborative members.

### Collaboratives use a variety of approaches to engage people with lived experience to strengthen their implementation strategies and promote positive outcomes

Like NOLA C.A.R.E.S., some collaboratives have intentionally engaged people who have experienced racial, gender, economic, and other inequities that the collaboratives seek to address.

- Collaboratives have convened people with lived experience in a variety of ways, including advisory groups, participatory action research, and roundtable discussions; they have also collected participant feedback through surveys.
- Through these formats, collaboratives have invited people with lived experience to provide input on service gaps, policy issues, details of inequities, and barriers to economic opportunity; to conduct research; and to spread awareness of the collaboratives' services.
- Collaboratives have engaged program participants<sup>7</sup> and members of the community, such as women and people of color who are workers, entrepreneurs, and small business owners.

#### These collaboratives described engaging people with lived experience in their work:


- Boston Opportunity System, Boston, MA
- New Orleans Innovating Through Our Water Crisis, New Orleans, LA
- NOLA C.A.R.E.S., New Orleans, LA
- Open Air Economy Collaborative, Los Angeles, CA
- POWER Collaborative, Baltimore, MD
- Rebuild Collaborative, Philadelphia, PA

Collaboratives that have engaged people with lived experience in designing and implementing their grant strategies reported that the engagement is part of their commitment to empowering those most affected by inequities to lead change.

- Engaging people with lived experience in grant design and implementation is intended to distribute decision making power more equitably and ensure that the collaboratives' work reflects the desires of the people they serve.
- Several collaboratives emphasized that by convening participants as advisors, they intend to build collective power among program participants to drive positive outcomes and systems change both during and beyond the grant.

<sup>7</sup> Among collaboratives in the 2021 cohort, engagement has focused on Black and Latine women specifically.





## Collaboratives engage in collective planning, implementation, and learning, often with the support of outside partners

- In addition to the POWER Collaborative, other Challenge collaboratives have augmented their strategic planning expertise by engaging consultants, facilitators, or evaluators. Collaboratives' approaches to engaging outside partners place value on strategy development as an important part of working together that requires time, resources, and often an external partner to facilitate.
- Collaboratives have found that it is not always easy for member organizations to coordinate effectively. Like POWER Collaborative, some collaboratives have taken steps to expand their capacity by working with consultants, facilitators, or evaluators who help them design, plan, and/or implement their initiatives.
- Collaboratives' engagement strategies include: working with a strategic advisor in planning their grant; engaging their local evaluators to provide learning insights to inform continuous improvement efforts; and participating in facilitated structured group reflection activities to guide their planning and work.


Collaborative member organizations recognize that they can have a deeper impact by working together than by operating individually, and the examples above illustrate the approaches some collaboratives have taken to support themselves in working together effectively.

## Collaboratives have engaged external partner organizations for multiple goals, including expanding their service delivery capacity and seeking expert guidance

The Rebuild collaborative formed a network of external partners to deliver services through the Challenge grant, and other collaboratives similarly have sought to work with external community organizations, though their motivations for doing so have varied.

- Like Rebuild, a few other collaboratives have connected with external organizations to expand their service delivery capacity.

### These collaboratives described using collective planning, implementation, and learning strategies:

- Advancing Early Education Collaborative, Washington, DC
  - Miami Cooperative Network, Miami, FL
  - NOLA C.A.R.E.S., New Orleans, LA
  - Open Air Economy, Los Angeles, CA
  - POWER Collaborative, Baltimore, MD
  - Project Vanguard, Minneapolis-St. Paul, MN
- 



- One collaborative looked to expand its reach by designating community-based organizations as ambassadors to connect with potential program participants.
- Other collaboratives have engaged external organizations for guidance on their strategies. For example, some collaboratives have engaged the expertise of outside organizations by establishing advisory boards and task forces of representatives of community-based organizations to provide direction to the collaborative.

Collectively, these approaches to engaging external organizations help ensure that the collaboratives have the expertise and the capacity needed to both develop comprehensive strategies and provide services to participants.

### These collaboratives described engaging external partner organizations in their work:

- Boston Opportunity System, Boston, MA
- West Side United, Chicago, IL
- Miami Cooperative Network, Miami, FL
- Rebuild Collaborative, Philadelphia, PA
- Syracuse Surge, Syracuse, NY



## Appendix. Methods

For this brief, the Challenge National Evaluation team gathered information from multiple data sources provided by Challenge collaboratives. Specifically, the Challenge National Evaluation team reviewed collaboratives' white papers and evaluation briefs and annual progress data. Additionally, in the spring of 2023, the National Evaluation team conducted interviews with four collaboratives and local evaluators from the 2020 cohort and six collaboratives and local evaluators from the 2021 cohort, focusing on the collaboratives' approaches to collaboration and experiences pursuing policy change. The National Evaluation team coded the spring 2023 interviews using qualitative coding software and held sensemaking sessions with collaboratives and local evaluators in the summer of 2023 to discuss the themes revealed in the coding. This brief also draws on collaboratives' theories of change and end-of-grant interviews with collaboratives from the 2019 cohort.



This report was prepared by Abt Global as part of its evaluation of The Challenge and PRO Neighborhoods.

Abt Global is an international policy and research organization with a 50 year history of conducting rigorous evaluations and supporting implementation of housing and community development initiatives. In 2018, JPMorgan Chase selected Abt Global to be the national evaluator of and The Challenge.

Funding for this brief was provided by JPMorgan Chase & Co.

Unless otherwise specifically stated, the views and opinions expressed in the report are solely those of Abt Global and do not necessarily reflect the views and opinions of JPMorgan Chase & Co. or its affiliates.

JPMorgan Chase is one of the oldest financial institutions in the United States. JPMorgan Chase invests millions of dollars each year to enable more people to contribute to and share in the rewards of a growing economy. The Challenge is a \$500 million, five-year initiative to drive inclusive growth and create greater economic opportunity in cities across the world.

---

## Acknowledgments

We thank the 2020 and 2021 Challenge collaboratives and their local evaluators for sharing insights from their work through interviews, evaluation briefs and white papers, and annual metrics.

We are grateful to the three collaboratives who allowed us to detail their work in this brief and shared their insights and guidance with us during the development process. We thank the NOLA C.A.R.E.S. Participatory Action Researchers; Dr. Nnenna Odum and Dr. Allisyn Swift from Beloved Community; Nancy Breton, Ali DeFazio, Kathy Namba, and Summer Wood from Ampersand LLC; Bria Marie Hodge and Omar Velasco from Latino Economic Development Center; Candace Chance from The VPI Firm; Dr. Christine Callahan, Julie Cronan, and Dr. Jodi Frey from the University of Maryland School of Social Work/Financial Social Work Initiative; Jennifer Lucas Crowther from PIDC, Tyrone Hampton, Jr. from Philadelphia Works, Aisha Herring, Tiffany Smith, and Kira Strong from The City of Philadelphia's Rebuild initiative, and Dr. Kelly Piccinino from McClanahan Associates, Inc.

We also extend our appreciation to the 2019 collaboratives whose prior interviews and white papers we drew upon for this brief.

This brief was developed by Annie Leiter and Nam Ha at Abt Global. The brief would not have been possible without the contributions of staff at Abt Global, including Brooke Abrams, Claire Douglas, Lauren Dunton, Swati Gayen, Amy Gorman, Nicole Klassen, Jeffrey Lubell, Anna Mahathey, Laura Paulen, Alex Silverman, Jeff Smith, and Stephen Whitlow.

JPMORGAN CHASE & Co.

