

# The Foundation Review

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Volume 12 | Issue 1

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3-31-2020

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### Recommended Citation

Takada, E., Nolan, C., & Mani, M. (2020). Assessing Change and Deepening Impact in Early Learning Systems: The Formal-System Self-Assessment Tool. *The Foundation Review*, 12(1). <https://doi.org/10.9707/1944-5660.1506>

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# Assessing Change and Deepening Impact in Early Learning Systems: The Formal-System Self-Assessment Tool

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**Keywords:** Evaluation, systems change, community systems change, participatory evaluation, systems-change tool, developmental evaluation, self-assessment

## Introduction

What constitutes meaningful progress for systems change is not always clear. This is particularly the case for public agencies, such as a school district, where administrators and staff are spread thin and progress must be measured on so many levels; or in an area like early childhood education, with a system that is very nascent compared to K–12 or higher education.

Additionally, many early childhood programs (e.g., preschools, child care, developmental health screening) that serve the same beneficiaries are often disconnected or “siloeed,” with multiple funding streams and data limitations that make it more difficult to understand the connections between and gaps in services within such a system (Melnick, Tinubu Ali, Gardner, Maier, & Wechsler, 2017). This makes it difficult for foundations that fund systems-change initiatives to know whether progress is being made to improve and strengthen systems, and for evaluators to monitor and measure progress in a way that captures not only impact, but also interim outcomes and learnings to advance ongoing development for foundations and grantees.

Despite these complexities, it is clear that for our youngest children to be healthy and ready for school, a strong systems approach to support all families, their young children, and early educators with coordinated resources and high-quality programming is necessary.

## Key Points

- The David and Lucile Packard Foundation is investing in a 10-year strategy, Starting Smart and Strong, that partners with three California communities to develop and test solutions to support parents, caregivers, and educators as they prepare children to be ready for school. Central to this strategy are community efforts to create comprehensive early learning systems that model quality teaching practices, secure and ensure adequate distribution of resources, and have capacity to improve, innovate, and scale.
- One of the challenges in systems evaluation is identifying meaningful indicators of interim progress toward longer-term change. From the start, the evaluation has been learning through interviews and observations how each community is approaching systems development. The evaluation team used those learnings and a literature review to inform the development of the Formal-System Self-Assessment Tool. To date, there has not been a quantitative tool that assesses community progress in this arena that also allows users to reflect on their work and develop data-informed strategies for deepening impact.
- This article explores how and why the three California communities and the Foundation have found the Formal-System Self-Assessment Tool to be a useful guide for focusing their efforts and creating greater understanding of their advancement. It also shares the tool’s development process to provide a helpful example for others working on long-term systems change who are grappling with how to identify meaningful interim progress.

*Launched in 2014, Starting Smart and Strong was designed as a shared, community-driven commitment that brings together public and private supporters to develop and test solutions that support parents, caregivers, and educators as they prepare children to be healthy and ready for school.*

### Long-term, Multicommunity Investment

The David and Lucile Packard Foundation's Early Learning grantmaking strategy<sup>1</sup> is guided by the principle that all children should have access to opportunities that help them be healthy, ready for school, and on track to reach their full potential. To do this, the foundation's Children, Families, and Communities program supports a range of efforts, including improving training and professional development for early childhood educators and caregivers and providing parents, extended family members, and informal caregivers with the information, coaching, and support needed to create environments where children can learn, grow, and thrive.

One of the Foundation's most significant investments is Starting Smart and Strong,<sup>2</sup> a 10-year, place-based strategy<sup>3</sup> that supports children and families in three California communities: Fresno, East San Jose, and Oakland. Launched in 2014, Starting Smart and Strong was designed as a shared, community-driven commitment

that brings together public and private supporters to develop and test solutions that support parents, caregivers, and educators as they prepare children to be healthy and ready for school. For the past five years, each Starting Smart and Strong grantee partner community has been working closely with local partners to lead and implement new approaches to meet the needs of their unique communities. Starting Smart and Strong strategies rest on four pillars: Professional Development and Training; Support for Family, Friends, and Neighbors; Healthy Development; and Scaling What Works.

Starting Smart and Strong communities are creating comprehensive early learning systems that model quality teaching practices and training, secure and ensure adequate distribution of resources, and have the capacity to improve, innovate, and scale. While the heart of this initiative is about scaling effective practices that result in improved child outcomes, the foundation team hypothesizes that scaling is not possible without the existence of a strong and coordinated early learning support system in each community — that is, creating the conditions for success. For the purposes of this work, we are defining “early learning support system” as the system of leadership, capacity, and infrastructure that supports early learning. This narrower definition focuses on actors, resources, and policies that support service providers, and not on the services themselves.

Further, over the course of Starting Smart and Strong, the Foundation is implementing a developmental evaluation (Patton, 2010) that is well-suited for work that is highly innovative and takes place within the context of complex environments. Therefore, the evaluation is focused on understanding the extent to which grantee partner communities<sup>4</sup> have or are developing strong early learning support systems by

<sup>1</sup> See <https://www.packard.org/what-we-fund/children-families-and-communities/what-were-doing/early-learning/>

<sup>2</sup> See <https://www.packard.org/what-we-fund/children-families-and-communities/starting-smart-and-strong/>

<sup>3</sup> Recognizing that each community has different structures, challenges, and opportunities, and that no two communities' approaches to early childhood development are the same, the Packard Foundation decided to take a place-based approach with which it offers direct grantmaking and technical support to Oakland, Fresno, and East San Jose.

<sup>4</sup> Each community grantee included a school district and its local collaborative partners (e.g., community-based organizations, other public agencies, advocacy groups).

learning from implementation and capitalizing on early and frequent opportunities to support community or Starting Smart and Strong successes. As the Foundation and the evaluation team learn from the work happening in Fresno, East San Jose, and Oakland, they can begin to work with communities to offer insights about what it takes to build early childhood systems so that any community can adopt best practices and scale what works. Through this testing and learning approach to grantmaking, Starting Smart and Strong strives to identify universal best practices, share these learnings across California to scale impact, and create a stronger system of support for young children — ultimately benefiting every child, parent, caregiver, and educator in the state by 2025.

Needless to say, this is a complex, long-term initiative in need of an evaluation tool that is able to adapt and respond to changes in circumstances or strategies at multiple levels (family, school, community, state, foundation). While the end goal might be clear (i.e., parents, caregivers, and educators are supported as they prepare children to be healthy and ready for school), the challenge in systems evaluation is identifying meaningful indicators of interim progress toward longer-term change. With a multiyear, place-based grant strategy for early learning, we felt it was important for the Foundation and community grantee partners to have meaningful data points along the way about systems change. One way to do that was to develop a tool that is participatory, can provide rapid feedback, and can engage grantees and their stakeholders in a process that is both reflective and strategic.

### Systems-Change Tool: The Development Process

When we began the development of this systems-change tool, one nonnegotiable was to stay true to the developmental evaluation approach and prioritize continuous feedback and learning as its function. The primary intent of this tool was to be able to lift up lessons that can be fed back into Starting Smart and Strong for ongoing growth and adaptation through the end of the 10-year strategy. This tool was developed

### Starting Smart and Strong: The Four Pillars

- **Professional Development and Training:** Starting Smart and Strong communities are testing professional development and training models for early childhood educators in formal settings, focusing on equipping the professionals who work with children every day with best practices for adult-child interactions.
- **Support for Family Friends and Neighbors:** Communities are testing new approaches to support and provide resources for informal caregivers, and to ensure authentic parent engagement.
- **Healthy Development:** Starting Smart and Strong strategies are working to ensure the healthy development of young children through access to universal developmental screenings and appropriate responses.
- **Scalable Solutions:** Starting Smart and Strong aims to scale what works by creating strong systems, committing resources, and engaging committed leaders who are willing to take action.

two years into Starting Smart and Strong, which allowed us to develop domains and indicators that were relevant and meaningful to the Foundation and its grantee partner communities. From the start, the evaluation team has been learning through interviews and observations how each community is approaching systems development. The tool items were informed by the Foundation's Theory of Change for Starting Smart and Strong (David and Lucile Packard Foundation, n.d.), interviews with key leaders and stakeholders in each community, numerous observations at strategic planning meetings and early learning trainings, learning and reflection sessions with grantee communities and the foundation, and thorough assessments of capacity in each community.

Additionally, through an extensive literature review, several systems-evaluation frameworks

were considered, among them *A Practical Guide to Evaluating Systems Change in a Human Services Systems Context* (Latham, 2014) and *Evaluation Systems Change: A Planning Guide* (Hargreaves, 2010). We chose to largely base our systems-tool framework on the Build Initiative's *Framework for Evaluating Systems Initiatives* (Coffman, 2007), which recognizes that systems initiatives are diverse and complex, and that it is necessary to have clarity on what grantee communities are doing and aiming to accomplish. There were three other determining factors:

1. The Build framework was designed with early learning in mind; therefore it defined and recognized key dimensions of success for a strong early learning support system.
2. The framework was not limited to a public social service system. It made room for public and private players and agencies to partner and collaborate in the systems-change space, which is necessary in these grantee partner communities as well as a component of this funding strategy.
3. This framework complements the developmental evaluation approach, which focuses on learning about emerging strategies and changes across stages of work and the idea that certain focus areas may be more relevant than others as the work progresses and matures.

While the ultimate goal of the Foundation's Starting Smart and Strong theory of change is for children to be healthy and ready for kindergarten, it was important for this tool to focus on those outcomes related to systems development that are important measures of progress along the way (Coffman, 2007). For Starting Smart and Strong, those community-informed outcome indicators linked to four focus areas of the Build framework:

- *Leadership development*, which mapped to the "context" area of the Build framework

and addresses building and improving the sociopolitical environment that surrounds the system, through system-level leadership, so it produces the changes needed to sustain it;

- *Quality improvement*, which mapped to the "component" area of the Build framework and addresses establishing effective and high-performing programs and services within the system;
- *Infrastructure*, which addresses developing the resources and supports need to function effectively and with quality; and
- *Alignment*, which mapped to the "connection" area of the Build framework and addresses creating strong and effective linkages across system components.

Once the rubric of indicators, rating scale, and their definitions were developed for the four focus areas, the tool was vetted with a core of early learning and social service community partners that represented the grantee partners and the Foundation. This ensured that the tool reflected the community-level perspective of what systems change would take. After some adjustments, the Formal-System<sup>5</sup> Self-Assessment Tool was ready to be piloted in the Starting Smart and Strong grantee communities.

## The Tool and Community Implementation

The Formal-System Self-Assessment Tool (FSAT) is a rubric<sup>6</sup> organized into a framework of four domains that are parallel to the four focus areas of the Build framework: leadership, quality improvement, infrastructure, and alignment. There are 24 indicators on which progress is rated by each grantee partner community, and each indicator has a four-point rating scale that represents continuous progress for developing early learning systems: 1 – Starting Up, 2 – Emerging, 3 – Strong Progress, and 4 – Embedded Progress.

<sup>5</sup>This version of the tool was designed to address the system that supports licensed, formal early learning settings, not unlicensed informal/family friend and neighbor care settings.

<sup>6</sup>See <https://www.betterevaluation.org/en/evaluation-options/rubrics>

**TABLE 1** The Four FSAT Domains: Definitions

FSAT Domain	Domain Description
Leadership (7 items)	Leaders at different levels within and outside the district (e.g., superintendents, early learning directors, principals, teachers, etc.) are committed and demonstrate leadership to support implementation and scale of effective professional development (PD) models.
Quality improvement (6 items)	The district has a clear, focused strategy and plan for improving the quality of early learning. There exists a culture of continual improvement and structures (e.g., data and dedicated time) to support learning and data-informed practices.
Infrastructure (6 items)	The formal sector has the resources and infrastructure (e.g., funding, staffing, facilities, and policies) needed to implement and scale effective PD models. Resources and infrastructure are adequate, aligned, and coordinated across institutions, and receive adequate attention from leaders at different levels.
Alignment (5 items)	District and other formal sector entities form partnerships with the broader system of leaders and providers in early childhood learning and healthy development. This includes public health, mental health, informal care networks and resource and referral networks.

Under each rating level is a brief description for each indicator to ensure a common understanding of each indicator and level of systems-change progress. (See Table 1.)

Each grantee partner community completed a retrospective baseline assessment and current assessment of their status (as of Year 3 of Staring Smart and Strong). Each grantee partner used a local-team approach to complete their assessments, working with their partners to ensure accurate representation of activities taking place across each domain. After this round of data collection, each grantee partner community will complete the FSAT every two years through the end of the grant strategy.

Completed assessments were submitted to the evaluation team for analysis. Basic frequencies were run on all items and summary mean scores were generated for each domain for each of the three communities as well as across all communities. Additionally, the evaluation team had a sense-making analysis session where results were examined within the context of other evaluation findings and observations from each community to date, as well as within the context of the Foundation's overall early learning strategy. The purposes of this analysis session were to validate

the findings, especially since this was the pilot year; and to prepare for learning and reflection sessions with each community grantee partner and the Foundation.

### *Response From Grantee Partner Communities*

Feedback and responses from grantee partner communities indicated that the FSAT was easy to use and the process to complete it was a positive experience. Grantee partners completed it in two weeks and the data were complete, including qualitative notes. All three communities completed them in teams, as strongly recommended. Community teams for the FSAT typically included the grantee partner lead, a project manager, and key partners (e.g., early learning director, Head Start manager, executive director of early learning or health nonprofit, family engagement specialist).

Initially, there were concerns among the evaluation team and the Foundation that the grantees might intentionally rate themselves low for the retrospective baseline to make their progress look larger, or select a rating to please the funder. This was addressed up front in four ways:

1. Under each rating, there was a description and/or examples of what progress in that

**TABLE 2** Sample of Leadership Domain Rubric

DESIRED OUTCOME	INDICATOR RUBRIC			
	Level 1: Starting Up	Level 2: Emerging	Level 3: Strong Progress	Level 4: Embedded Progress
1. District superintendent is committed to early learning.	District superintendent has not expressed a commitment to/ support of early childhood education (ECE).	Superintendent outwardly supports ECE, voices ECE as a priority.	Superintendent establishes clear expectations and goals on ECE quality internally.	Superintendent establishes clear expectations and goals on ECE quality internally and externally (e.g., families, local policymakers).
2. Early learning director is empowered.	District does not have an early learning director.	District has an early learning director and staff to support this position.	Early learning director has the authority and resources to support professional development (PD) and testing & learning (T&L) efforts as needed.	Early learning director has the authority and resources to scale ECE PD districtwide.
3. A culture of participatory decision-making exists across all levels of district staff (e.g., site administrators, site directors, teachers).	Participatory decision-making does not occur within the district; there is not a practice of gathering perspectives from all levels of district staff (e.g., teachers, site directors, district administrators).	Perspectives from teachers, site directors, and administrators are gathered separately; perspectives are not aligned.	Perspectives from teachers, site directors, and administrators are considered when decisions are made, but a participatory decision-making process does not yet exist	The district has established a mechanism for participatory decision-making; representatives from all levels inform district decisions.
4. District-level leaders champion ECE PD, including T&L efforts, in their district and beyond.	District-level leaders are not bought into the importance of ECE PD or T&L.	District-level leaders understand the value of ECE PD, but are not committed to T&L.	District-level leaders value ECE PD and are committed to T&L.	District-level leaders champion ECE PD in their district and beyond, including T&L.
5. Teachers are committed to the ECE PD delivered, including T&L efforts.	Teachers are not committed to utilizing/participating in ECE PD, including T&L.	Teachers are willing to participate in ECE PD, including T&L.	Teachers implement the best practices recommended by ECE PD, including T&L, in their classrooms.	Teachers develop internal structures to support ongoing reflection and implementation of best practices.
6. District-level leadership is committed to sustaining ECE PD.	District-level leaders have not bought into the importance of ECE PD.	Buy-in for ECE PD is concentrated among a small group of district leaders.	District-level leaders are bought into the importance of ECE PD.	District-level leaders are committed to ensuring resources for ECE PD remain a priority for the district, even in the face of leadership transitions.
7. District staff at all levels are working in unison toward a common vision for ECE PD.	Commitment to developing a shared vision for ECE PD is nonexistent.	Engagement in ECE PD efforts is concentrated among midlevel staff at the district. A shared, common vision is not yet apparent.	Engagement in ECE PD efforts includes staff at all levels of the district. A shared, common vision for ECE PD is in development.	Engagement in ECE PD efforts includes staff at all levels of the district. A shared, common vision is apparent.

indicator would look like; therefore, each rating level was clearly defined and meaningful, instead of just a number. (See Table 2.)

2. We designed the tool be completed as a community team (versus just the grantee lead), and asked each grantee partner to identify its team.
3. Community grantee partners were informed that they were not expected to be at an “embedded progress” rating across all indicators by the end of the initiative, as we understood that each community had different strengths, challenges, and needs based on unique cultural and political contexts.
4. Most importantly, we were clear from the start that FSAT was a self-assessment tool designed to help grantee partners better understand their systems-change process and make informed strategic decisions. This was not a tool designed to directly affect any grantmaking decisions.

Further, during the analysis process, we found that the results from each community made sense and were supported by most of the qualitative data we had gathered to date as part of our developmental evaluation. We also encouraged grantee partners to provide any narrative notes as examples or to explain why they selected the rating.

### *Rapid Feedback*

What is unique about this systems-change tool is that once complete, the community grantee partners had their data and could act on it immediately. It was not necessary for an analyst to run statistical tests for grantees to understand or interpret the data; however, as evaluation partners, through community learning sessions we provided summary data and data visuals to show progress and point out bright spots and areas in possible need of more attention. We also presented this information alongside their other evaluation data, such as child outcome assessments and teaching practice data, in an effort to give communities a chance to see the bigger early learning picture. One remark in particular

represented much of the feedback: “I’ve never seen systems-change data before. The bigger picture of what we are doing makes more sense to me now.”

The simplicity of the rubric also allowed us to rapidly feed this data back to the Packard Foundation. Through a learning and reflection session with the foundation team, they were able to see systems-level progress three years into a 10-year strategy and have in-depth discussions about whether the grantees were where they expected them to be; if strategic decisions needed to be made regarding what additional resources might be needed in grantee communities; and if targets and benchmarks for the overall strategy needed to be adjusted. The Foundation also discussed strategic partnerships it had in each of the three communities and how those might be leveraged to help advance early learning systems change. Finally, it was a crucial learning opportunity for the Foundation to have seen this early progress and have data points that indicated what systems change looks like in each community and what kind of impact it was starting to have.

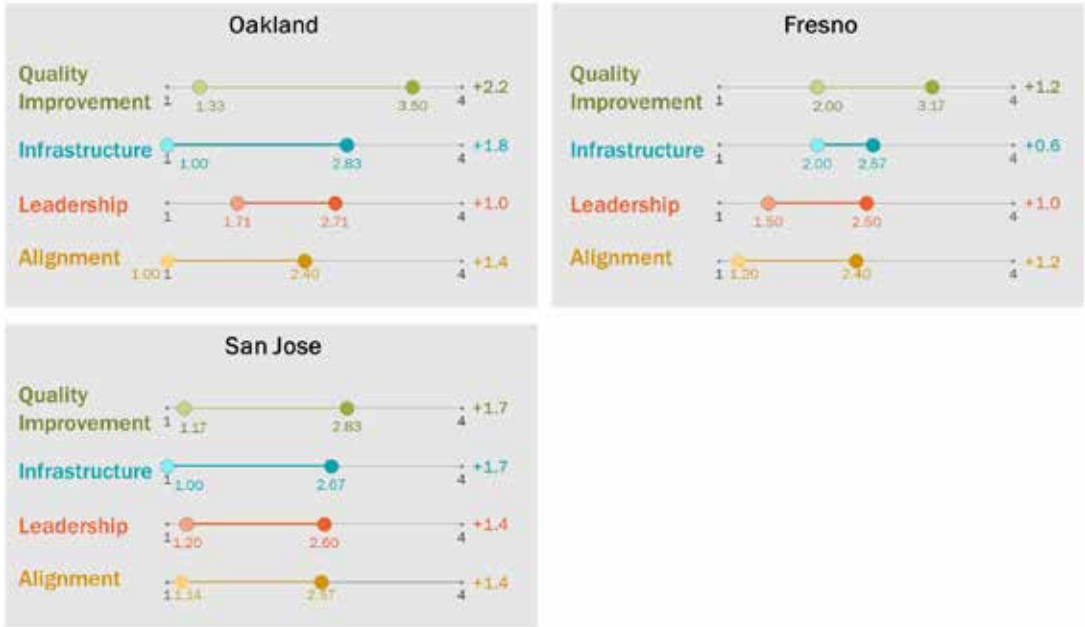
### **What Did the FSAT Data Show?**

The first two data points from each community, which represented three years of early learning systems development work along a 10-year strategy, showed various levels of progress both within and across all grantee partner communities. The most salient findings were as follows:

- Community grantee partners have approached systems development in different ways, but in ways that were suited to their contexts. It was interesting to see that the FSAT was able to capture that nuance. (See Figure 1.) Fresno, for example, had a strong early learning infrastructure to start with, so it was more natural for it to build from there and to also result in a stronger infrastructure rating by Year 3.
- Despite known leadership instability at the school district level (e.g., high turnover of superintendents), all communities have demonstrated progress developing early learning leadership. (See Figure 2.)



**FIGURE 1** FSAT Scores by Community, Baseline to 2017

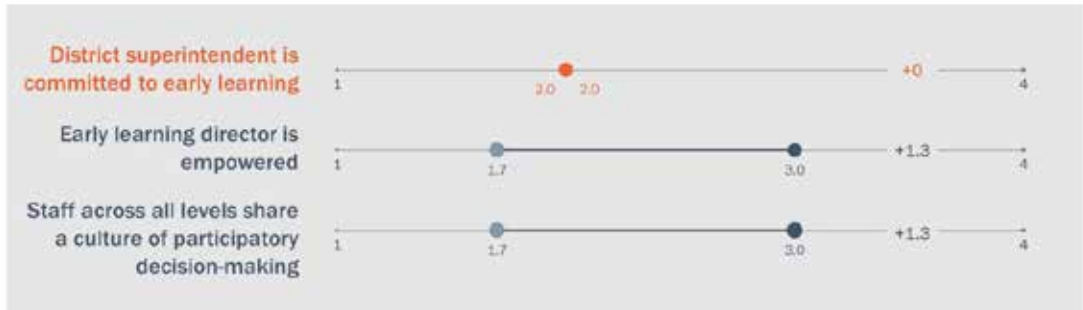


**FIGURE 2** FSAT Scores by Systems-Change Domains, Baseline to 2017



**FIGURE 3**

Leadership Indicators Score, Baseline to 2017: Comparing District-Level Leaders to Midlevel Leaders



- More specifically, data within the leadership domain demonstrated the importance of midlevel leadership (e.g., early learning directors, program managers). The Foundation made intentional investments in developing this leadership, and it followed that community grantees cultivated leadership and demonstrated stability in early learning departments. (See Figure 3.) This was important progress for the Foundation to see.
- The most progress was made in the quality improvement domain, specifically in changing and improving how early learning data were used to develop and/or enhance quality teaching practices and approaches.
- In the infrastructure domain, findings showed that resources (i.e., finances, time, staffing, materials) targeted to early learning professional development had increased. All three communities demonstrated strong progress.
- The least overall progress was seen in the alignment domain, and communities noted the challenges of working with traditionally siloed partners and multiple funding streams. This focus area will require more long-term strategic planning and development. This was also the domain where the indicators needed the most adjustment following the pilot.

- Overall, grantee partner communities focused on developing leadership, bringing stability to their infrastructures, and targeting their work toward quality improvement of early learning professional development. Three years into Starting Smart and Strong, there is room for further progress for all communities.

Finally, when we followed up with grantee partner communities, we learned that they used this data to set priorities for three-year strategic planning, develop systems-change benchmarks, and share systems data with school boards and community partners.

## Conclusion

Ultimately, what made the FSAT work was the development process. It brought together research expertise with community wisdom, and agreements were made together about how to measure and understand meaningful progress, rather than being driven by the funder or an external framework. This process also increased participant ownership of what the tool measures and the resulting data.

Although the FSAT has shown to be promising and useful for grantee partners and the Packard Foundation for assessing and monitoring systems change, it is by no means perfect. It does not attempt to be the one tool to assess systems-change initiatives. It is still one of many data points needed to truly understand the

complexities of a multisite, multipartner, long-term systems-change strategy. The Starting Smart and Strong evaluation will continue to collect qualitative data and assess findings against other standard measures of early childhood learning and development. The Foundation plans to continue using the FSAT through the end of the 10-year Starting Smart and Strong strategy, and communities have expressed that they are eager to have another systems-change data point.

Here are some key lessons learned for funders, evaluators, and practitioners.

### *Lessons for Funders*

- For a multiyear (e.g., 10-year) place-based initiative, funders must have interim data points to develop both clarity and a deeper understanding of what systems change looks like for community grantees (Mack, Preskill, Keddy, & Jhawar, 2014). The FSAT can do this by providing local and strategy-wide progress data.
- Data like those from the FSAT also help funders to understand how their investments might be contributing to community-level change, while informing them about what resources may be necessary in the next phase of their work.

### *Lessons for Evaluators*

- The FSAT provides a more meaningful framework and tangible means to describe and show systems change, especially for a multiyear initiative.
- Include grantees and/or community partners in the development process of a systems-change evaluation/self-assessment tool to ensure that the measures of progress are meaningful, and to encourage participant ownership.
- The FSAT is a good learning tool to generate and facilitate meaningful discussions among foundation staff and grantees.

- As part of a developmental evaluation, the FSAT allows evaluators to have a more nuanced discussion of what could be contributing to systems change and plan for next steps of the evaluation.
- It is important for evaluators to have sense-making analysis sessions with FSAT data and to be flexible and willing to make adjustments to this type of tool. Initially, some items may not work as intended, and as initiatives and communities evolve, it may be necessary to add or replace items. This may especially be true for systems-change initiatives occurring within politically charged public systems.

### *Lessons for Early Learning Practitioners/Grantees*

- Practitioners/grantees of public systems are juggling so much that a tool like the FSAT can help them to ground their understanding and focus on advancing systems change.
- When practitioners/grantees physically have the FSAT tool in hand to complete with key members of their team, they have created the time and space to reflect on where they have been and strategically plan their next steps.
- As follows, systems data can then be used to set priorities and benchmarks, and to share their needs and strategies with key decision-makers.

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