

A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic

JUNE 2022

Christine Wade and Alex Cortez

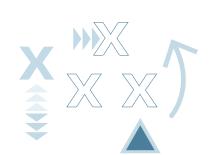
Saga Education

Introduction

s outlined in "A Pragmatic Playbook for Impact: Direct. Widespread, and Systemic," education entrepreneurs routinely grapple with how to close the gap between the scale of impact they can achieve through direct programming and their ultimate vision for change. Bridging between the two has become even more urgent as we emerge from the COVID-19 pandemic.

To move from a narrow theory of action to enacting a successful theory of population-level change, education entrepreneurs must consider working across three strategies for impact:

- **Direct Impact:** How an organization provides programming directly to its target beneficiaries.
- Widespread Impact: How an organization builds the capacity of partner organizations to replicate elements of its program model.
- Systemic Impact: How an organization shifts mindsets, relationships, and power to in turn shift the policies, practices, and resource flows that create stronger conditions for adoption of an organization's values, program model, and its ultimate vision for change.¹



This is one of three case studies that accompany the report, A Pragmatic Playbook for Impact: Direct, Widespread, Systemic. Case studies of the other two organizations, Envision Education/Envision Learning Partners and uAspire, can be found on our website.

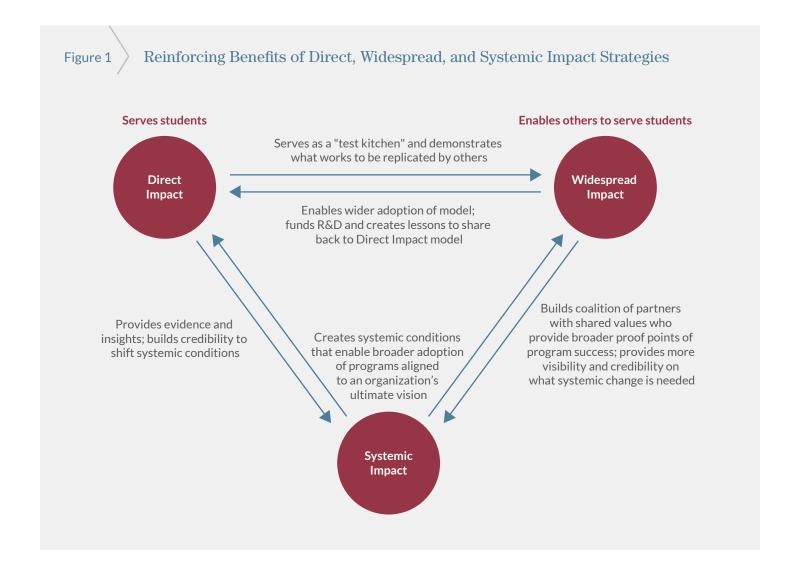




These impact strategies are not mutually exclusive but rather reinforcing and cyclical (Figure 1).

While education entrepreneurs and their organizations frequently begin in Direct Impact, many expand to work across all three over time. However, each strategy requires thoughtful consideration in design choices, resourcing, and impact measurement to ensure fidelity to an organization's vision, mission, and values.

Saga Education (Saga), a national leader in high-impact tutoring, is constantly innovating to better serve students directly, supporting partners to adopt "what works," and influencing systems change through a range of Direct, Widespread, and Systemic Impact strategies grounded in evidence and coalition-building.



Saga's Roots in Direct Impact

Saga envisions a world where students — especially Black and Latinx youth and students experiencing poverty — have equitable access to economic and social mobility. To achieve this, Saga seeks to establish high-impact, in-school-day math tutoring as an integrated part of a student's education and as a proven response to educational inequity.²

Launched as a freestanding nonprofit in 2014 after beginning as an initiative within Match Education, Saga developed a rigorous, personalized, and relationship-driven high-impact math tutoring program. Since its inception, Saga has validated the efficacy of its Direct Impact program through multiple rigorous evaluations. Through these studies, it has been shown that Saga students learn up to 2.5 additional years of math on top of their normal one-year growth in one academic year using Saga's model. In parallel, Saga has grown to serve 7,000 students in six cities across the United States (as of the 2021-22 school year).

Over time, Saga tested modifications to its Direct Impact program, including: a tutor's caseload; the ratio of tutors to students; the dosage students receive (defined as the amount of support required to achieve impact — duration, frequency, and intensity of engagement); and the delivery methods (in-person, virtual, and hybrid). Throughout, Saga has maintained strong outcomes for students (validated by randomized controlled trials) while reducing cost and other barriers to scale, such as the ability to train the number of tutors needed to serve more students.

Looking Beyond Direct Impact Work at Saga

Saga saw significant demand and growth in its Direct Impact work since its founding but always had ambitions for greater impact. Co-founder and Chief of Marketing and Communications AJ Gutierrez reflected that, "At our core, we want to inspire systems change. We knew at some point there was going to have to be an extension of what we do directly to also enable districts to implement high-impact tutoring independently. We thought that would happen much later; however, COVID-19 was a catalyst for accelerating this core strategy."

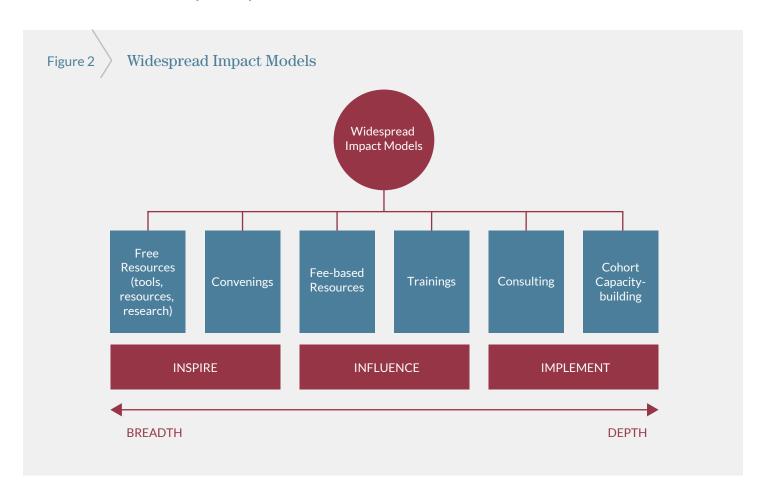
Before the pandemic, Saga explored a first foray into Widespread Impact by consulting for Dr. Bowen Paulle, a professor at the University of Amsterdam, who was looking to deploy and evaluate the impact of high-dosage tutoring projects in the Netherlands, with a goal of using what he learned to support program design of a nonprofit serving students in and around the city.³ This partnership gave Gutierrez confidence that "there was a pathway to help another organization do what we do effectively."

While Saga's Co-founder and CEO Alan Safran acknowledged he had been hesitant to partner in the past, when March 2020 hit, he said, "I started to think, look, there's going to be a crying need for better educational supports for kids' education and acceleration, and we could be a part of that solution — a vision that is so much bigger than trying to grow via Direct Impact."

Saga's Approach to Widespread Impact

There are a range of Widespread Impact models that organizations can consider (Figure 2). These are not mutually exclusive, and many organizations' Widespread Impact models are mutually reinforcing. Some organizations start and concentrate on one model, while others immediately or eventually expand to a suite of Widespread Impact options.

Saga is a case study in how an organization begins in one Widespread Impact model category (Figure 2, Inspire) and expands ambitiously but strategically into others, all while continually layering the value of one Widespread Impact model onto another.



Initially, Saga launched free resources because it had already codified parts of its model and felt an urgency to help similarly mission-aligned organizations. As Safran reflected, "We've learned a lot over 17 years, and at this point much of that's codified, so we could put that out and make it free ... sharing as much as possible now to help meet the urgent need."

This thinking led Saga to implement three major Inspire-oriented Widespread Impact resources to quickly help school districts begin to implement their own versions of the Saga model (Figure 2, Inspire):

- Saga Coach: A free, self-paced training portal for any organization or individual to use in developing the mindsets and habits of a successful tutor, with particular emphasis on relationships, ratio, and rigor.
- Saga Connect: An online learning platform with integrated audio-video conferencing capabilities and digital scratch pads and whiteboards equipped with math tools for live tutor-student interactions (Saga provides a free version and a modestly priced version to host the audio and video in-house).
- Saga Curriculum: A free, high-quality math tutoring curriculum tutors can use with their students based on what Saga uses in its Direct Impact model.

Saga knew its Inspire breadth offerings (Figure 2, Inspire) would be a valuable starting point for some districts and nonprofit partners, but it also realized that many districts would ultimately want greater, more intensive supports to implement the Saga model with fidelity. Saga explored how greater depth models might provide districts with what they were asking for and what Saga felt partners needed to ensure sufficient fidelity (Figure 2, Influence and Implement).

To test these hypotheses, Saga launched Saga Consult, an Implement model (Figure 2, Implement) providing hands-on consulting and technical assistance to help partner districts and nonprofit organizations develop and implement high-impact tutoring programs. Saga Consult's engagements begin with customized program design, consulting on sourcing tutoring talent, tutor training, access to Saga's free tools, and intensive support on how to deploy them. As programs get up and running, Saga also provides a tool to measure student progress and conducts observations to support implementation with fidelity.

Based on early learnings from each Widespread Impact model and partner successes and challenges in adoption, Saga is continuing to explore even greater depth models in the form of a multiyear cohort capacity-building program (Figure 2, Implement) by working with a range of districts to implement highimpact tutoring in their schools, have them demonstrate evidence of impact to their stakeholders, and see this shift budgeting and school schedules to make tutoring a sustainable norm.

Looking across Saga's suite of Widespread Impact offerings, Safran sees its breadth options as a path to more depth and even systems change goals, saying, "We can step in and get our profile raised so that a lot of people notice us and they take advantage of our free products first, and then they want more ... sharing our DNA is the best pathway to hoping that at the end of the next three years, schools change their schedules, budgets, and human capital approach to build tutoring into the school day. That's our clear, strong, strategic vision."

Saga sees such strong potential in its ability to shift mindsets that it's willing to partner with school systems who are attracted to the organization's free, lighter-touch offerings even if they're not fully sold on the Saga model at the outset. For example, one state was looking for help supporting an out-ofschool-time tutoring program. Even though one of the core elements of Saga's model is that tutoring takes place during the school day, it offered free consulting to the out-of-school-time program. This approach helped Saga demonstrate its value. As Safran noted, "Once we're in the house, we can have conversations about shifting mindsets towards a better model."

As organizations consider which Widespread Impact offerings to adopt, they must grapple with five trade-offs (Figure 3). Here is how Saga grappled with each decision:



1 Breadth versus Depth: As noted above, from a breadth-versus-depth perspective, Saga began on the breadth end of the spectrum but evolved to offer deeper Widespread Impact models. The need was too significant to not help as many partners as possible via breadth work, but there was also significant need and demand for depth-level partnerships.

2 Fidelity and Control: Through its Widespread Impact breadth models, Saga understands that its requirements for fidelity and control are inherently limited (but that reach is significantly increased). However, Gutierrez highlighted how Saga pursues more fidelity in its consulting work by "memorializing the central aspects of program implementation in a flexible way."

To help increase fidelity through its consulting Widespread Impact model, Saga pursues a range of practices (Table 1).

Table 1

Saga's Approaches to Increasing Implementation Fidelity

Thoughtfully approaches relationships and change management with partners

- Saga builds buy-in and relationships with district leaders and individuals several layers below them (grasstops through grassroots) to maintain momentum and success when leadership inevitably changes.
- Saga assigns a point person and a team of client relationship managers to collaborate with partners.
- Saga stays involved with partners long enough to ensure lasting commitment (that can weather leadership changes), evidence of impact, and/or other evidence that gives Saga confidence that implementation will stick.

Uses observations and data to monitor implementation

- Saga holds inspections to look for adherence to core principles for highly effective tutoring.
- While acknowledging growth needed in this realm, Safran noted that Saga leverages its data to "compare districts that have high adherence versus low adherence in terms of implementation," guiding conversations or supports it uses with partners to increase fidelity.
 - > According to Safran, "It's helpful to have a third party in conversations with a partner — whether it be data, a memorandum of understanding, or something similar — it's a tool for moving people and being able to say, 'It's not personal, it's what the data says."

Works toward policy change to provide partners with a high bar and implementation guardrails

- Saga believes that implementation will be stronger and more sustained when its most effective tutoring practices are codified and protected by policy.
 - > Gutierrez reflected: "Policy both guides districts to stronger tutoring implementation and it also protects where strong implementation is already happening. Advocacy is so important for nonprofit organizations to make sure policy promotes programming with evidence of what works — and how to replicate it."

However, even with these approaches to increasing fidelity, Safran acknowledged that no Widespread Impact model will be as strong as Saga's Direct Impact work — but they don't need to be to make the case for Saga's ultimate goal: "Even with legislation, even with other things [to increase fidelity], we still have the likelihood of slippage from the ultimate best model. But we're happy with moderate adoption. The question is, is it going to be good enough to make the case

that tutoring should be part of the redesign of American schools? That's our North Star. What we're doing is trying to get the evidence of tutoring strong enough that it will cause the redesign of American schools three years from now when the federal stimulus money is gone."

- 3 Investment: Philanthropic and government funders were eager to support Saga's high-impact tutoring for students during COVID-19 recovery. This eagerness gave Saga and potential partners plenty of investment support necessary to codify, design, and scale Widespread Impact offerings across the country amid the pandemic. However, Gutierrez noted that Saga is aware that a sustainable business model is key to long-term success; financial sustainability continues to guide its thinking about specific Widespread Impact strategies to pursue.
- 4 Measurement: Saga's access to funding and significant market demand was due, in part, to its strong Direct Impact outcome measurements. This gave Saga the confidence to introduce a range of Widespread Impact offerings and measure a range of inputs, outputs, and outcomes, even if it's limited in its ability to track student outcomes (Table 2).

Examples of Saga's Widespread Impact Measures Table 2

Inputs	Investment in time, talent, and money	Allocation of staff and resources to each Widespread Impact model: Saga Coach, Saga Connect, Saga Curriculum, and Saga Consult.
Outputs	Reach and engagement	For breadth models (Figure 2, Inspire): Number of individuals accessing each resource. Number of training modules reviewed. Time spent on training modules or Connect platform. For depth consulting model (Figure 2, Implement): Number of partners. Hours of consulting sessions.
Outcomes	Satisfaction	User satisfaction with tools and content.
	Knowledge Attitude	Pre- and post-survey to measure knowledge gained and, to some extent, attitude changes (e.g., knowledge of the strategies of effective tutoring, comfort and confidence in ability to build strong relationships) from its consulting work.
	Action	With consulting partners, Saga is beginning to measure actions by having observers blindly evaluate performance of tutors, some of whom are trained by Saga, while others are not.
	Student Performance	Saga's consulting model includes regular diagnostic assessments of student progress.

Safran acknowledged: "It's been harder for us to link our Widespread Impact consulting work to a school or district's summative assessments of student outcomes. However, we do provide our consulting partners with formative assessments to inform our collective tutoring efforts. This is a great feedback loop to drive student progress that some schools otherwise don't have."

In addition to these impact measures, Saga tracks various economic measures, acknowledging the importance of strong financials to sustain an organization (and its growth) over time. For example, as Saga has been exploring the launch of its cohort-based program, it conducted a market analysis to ensure potential partners' willingness and ability to pay. Additionally, once this program launches, Saga will test hypotheses around an ideal set of supports to efficiently and effectively ensure a partner's successful impact. By gathering feedback directly from customers about what supports they find most valuable, Saga can continue to optimize its offering to maximize return on investment (ROI). On this, Gutierrez noted, "This feedback loop is going to shape how we approach our district services over the next few years."

Target Market of Partners Prepared to Implement: Saga identified a fairly broad target market including districts, particularly those with historically underserved student populations. Its breadth models are explicitly designed not only to reach many organizations but also as a way to attract interest in its deeper consulting model. Even for its depth consulting model (Figure 2, Implement), Saga is open to a range of potential partners (states, districts, and charter school networks). However, to prioritize and screen for readiness, Saga focuses on partners with large student populations that are actively seeking a trusted consulting partner (i.e., partners issuing requests for proposal).

The Role of Technology in Saga's Widespread Impact

Saga knew that hands-on technical assistance would rely too much on human capital to scale at the pace desired, so it turned to technology. Gutierrez reflected: "We knew that technology was going to play a role in our ability to rapidly scale our best practices and resources. So, with backing from the Bill & Melinda Gates Foundation and other philanthropies, we acquired an ed tech company (the former Woot Math) to help us. The team we acquired is world-class, and we have tripled the size of our technology team since October 2020. [This investment enabled us to] codify what we believe to be best practices and then put them on a self-guided software platform that is instantly scalable. It allowed us to dramatically increase our reach right out of the gate in a very short amount of time."

As Safran reflected on the necessity and potential of technology in Widespread Impact, he explained that "if you're driven by ROI, which is a driving force to scale, you have to address both cost and effectiveness — and technology is a tool to address both."

Saga's Journey Into Systemic Impact

Saga believes that systems change starts with creating evidence through Direct Impact work. As Gutierrez explained: "We have this really audacious goal to inspire schools and districts to reimagine their approach to human capital, budgeting, and scheduling to provide high-impact tutoring during the school day. And in order to create that kind of systems change, we knew we had to have rigorous scientific evidence that shows this type of tutoring-based work is effective."

As Saga built its research base, Gutierrez noted that the team "worked closely with our research partners to host data briefings with influencers, think tanks, and policymakers ... which started setting the groundwork for interest in this work ... which paid dividends when the moment [to engage in Systemic Impact work came through."

The pandemic accelerated Saga's entry into Systemic Impact work. As Gutierrez put it, "As an organization, we always wanted to create systems change, but we always thought that it'd be a longterm vision. The pandemic was a catalyst, expediting the timeline. The moment is now to push for changes we want to see, because policymakers recognize that the status quo is no longer acceptable and that they have to do something different."

While its Systemic Impact team was and remains small (Gutierrez is currently the only team member dedicated to Systemic Impact work), Saga has covered tremendous ground in systems change work in a short period of time. This is due, in part, to the credibility and relationships Saga established pre-COVID-19 and the rise in national interest in tutoring amid the pandemic.

Across all of its Systemic Impact work, Saga keeps students and tutors front and center. Saga uses what it learns from student and tutor experiences to shape its systems change agenda and elevates student and tutor voices where possible.

Saga continually reflects on the following questions in designing and executing its Systemic Impact strategy:

What change do you seek, and for which systems? At the federal level, Gutierrez noted that there's power in "getting credibility from a government source like the U.S. Department of Education to show that high-impact tutoring is an effective recovery model to consider. That, in turn, has a trickle-down effect of influence as others think about pandemic recovery."

Additionally, efforts at the federal level can unlock funding to support tutoring and establish guidelines to ensure it's delivered in a high-impact way. Gutierrez reflected: "We've gotten the U.S. Department of Education to allow American Rescue Plan Act funds to be spent on tutoring. So now that that guidance is out there, we want to make sure there are guardrails for what high-impact tutoring looks like, because it's up to every state to interpret. And then, because we know a new administration could come in and completely change everything, we're working on Congressional appropriations to specifically allow (and encourage) Title I dollars to be allocated to high-impact tutoring. That sets a precedent to invest in our model for the long term."

At the state level, Gutierrez considered how much "education leaders care about what other education leaders are doing," which contributes to Saga's desire to involve state policymakers, districts, and other relevant organizations (e.g., Chiefs for Change) in creating playbooks or policies that build momentum around tutoring.

How is that change achieved? Who else needs to be involved? Gutierrez is the first to admit: "We're a small 501(c)(3). We've demonstrated strong results, which puts us in a position to have a strong voice in the sector. Despite not having a robust apparatus in policy, our positioning helps us create momentum ... but our approach has primarily been old-school relationship building and thought leadership."

Saga's thought leadership has had significant ripple effects on its influence and ability to fund Systemic Impact work through philanthropy. Gutierrez reflected: "If you have key policymakers and influencers reading [your content], it strengthens the credibility of your work and builds momentum. And when the philanthropic community sees that, it helps us raise money to do this work. It also creates allies who will speak meaningfully about us on our behalf."

Saga also recognizes that it can only cover so much ground alone. To this end, Saga has also leveraged two partners — <u>Fulcrum Public Affairs</u> and <u>Whiteboard Advisors</u> — to help design its state and federal strategies and build relationships.

To date, Saga has built strong relationships with key stakeholders such as the U.S. Department of Education and AmeriCorps (through which Saga and many organizations receive funding to support school programs), and met with more than two dozen Congressional offices on Capitol Hill (including those of leaders on key committees of oversight). Saga drafted policy guidance, provided expert testimony, and participated in a range of coalitions focused on specific initiatives. Saga has also been featured in a number of studies and research briefs (e.g., McKinsey & Company's study on COVID-19 and learning loss).

Overall, when asked to reflect on what he's most proud of in this work so far, Gutierrez said, "We now have the president of the United States saying [in his State of the Union address] that he wants to make high-impact tutoring a priority ... the research base is helping to inform policy, and that's exciting."

Looking Forward: The Future of Saga's Direct Impact Model

Saga's Direct Impact work remains important for testing, evidence, and impact. Safran noted: "We will always keep our Direct Impact model. We want to demonstrate that the highest fidelity will be a Sagarun site. And we want to respond to the needs of school systems to make this viable on Title I funding in order to reach more students while continuing to achieve strong results."

Gutierrez adds: "It's never enough data. We're always skeptical, always curious about more, and so I don't think there's ever a point where we will feel like it's enough. There are so many outstanding questions we have about ways to get better model modifications, integrating technology into tutorials, etc."

As Saga looks to the future of its Direct Impact work, Safran acknowledged its goal is to "optimize it and reduce its cost for districts." Saga sees technology (and its technology team) as key to both goals and launched technology-enabled virtual and hybrid versions of its Direct Impact model in response to the pandemic.

Not only does technology play a role in how tutoring is delivered to students, but also, Safran acknowledged, "if we want to scale Direct, we need to find a scalable way to train legions of tutors" — which he expects will require using technology in new and creative ways.

Organizational Implications of Saga's Expansion Into Widespread and Systemic Impact Work

Expansion into Widespread and Systemic Impact presents new challenges for an organization, including implications for its structure and culture. Saga made several strategic organizational moves to support expansion of its Widespread and Systemic Impact work.

Saga formed teams aligned to each impact strategy, but staffed to spread expertise across the organization: Saga structured its leadership team to have a distinct leader over each of its Direct, Widespread, and Systemic Impact strategies. Saga's hope is that this clarity gives leaders and teams the ability to focus on specific aspects of each model and streamline decision-making. However, there still must be alignment across all departments about the values underpinning Saga tutoring. Safran noted, "We moved some people from our Direct Impact tutoring program into our emerging Widespread Impact strategies because we needed the DNA of our original program to ensure the new program was grounded in what worked."

Saga transparently communicates its "why" and priorities to its team: Safran and Gutierrez understood that when an organization begins to take on Widespread Impact (and Systemic Impact) work, it can create confusion and concern across the team, particularly for those driving Direct Impact strategies. Gutierrez reflected, "Grounding people in the greater 'why' is starting to become a great priority for us as we expand into a more ambitious set of directions and impact." Saga uses transparent town hall meetings to discuss its work. According to Safran, this includes explicitly naming that Saga "will always have a Direct Impact side of the house. It is our crown jewel, with the highest fidelity and deepest ongoing impact on students, and the place where we can test modifications that can improve tutoring further."

Saga views its three impact strategies as reinforcing but difficult to scale simultaneously — requiring balance and independence across teams: Saga sees the three strategies as inextricable and mutually reinforcing. Safran noted, "I see it as the Holy Trinity now: Direct, Widespread, and Systemic."

Yet Gutierrez also noted, "It's very difficult to try to scale your Direct and Widespread Impact work at the same time because you're asking a lot of your people." Saga's original ambition was to significantly scale its Direct Impact model before expanding into Widespread Impact, but, Gutierrez noted: "We had to step back and say, 'Look, we're going to keep status quo for Direct Impact so we can build the right systems, so that we can potentially grow that work over time.' But that became less urgent for us."

To successfully balance across all three strategies at once, Gutierrez acknowledged, "As a team, you have to put in a lot of work and be very thoughtful about the action plan." This includes thinking about organizational capacity (including new competencies that must be built) and business plans for each model's components. In addition, Saga is careful about protecting the independence of each team's capacity and resources while also ensuring organization-wide visibility and transparency.

Saga's Reflections for Leaders Beginning the Journey to Widespread and Systemic Impact

Here are Gutierrez and Safran's lessons learned from Saga's journey into Widespread and Systemic Impact:

Evidence is critical: Organizations must build an evidence base before moving into Widespread and Systemic Impact work. Safran noted, "Evidence is critical — it was the wind beneath our wings to every opportunity ... you don't have any credibility without evidence." And while Saga worked hard to build an early evidence base, Gutierrez also noted how important ongoing curiosity is to its continued success: "We've always been curious about how we can make our program stronger and more cost-effective to make it more accessible to schools and districts across the country. And as we make changes to our model, we try to understand how those affect student outcomes through rigorous evaluations." Saga's initial evidence and continued efforts to improve strengthen its credibility with potential partners at the Direct, Widespread, and Systemic Impact levels.

Build relationships with influencers and advocates: Gutierrez and Safran frequently referred to the value and strength of Saga's approach to relationship building — not only to support Systemic Impact work (as outlined above) but also to support its initial entry into Widespread Impact work. Safran noted: "We had laid the foundation, making sure the world knew about our Direct Impact program long before we went into Widespread Impact. So when the time came, we had already built an ecosystem of influencers and impartial advocates." As organizations transition from Direct Impact into Widespread Impact, there's often a shift in understanding of its core offerings among stakeholders (e.g., an organization moving from a vendor to a capacity builder to a thought leader); strong stakeholder relationships are invaluable in facilitating that leap. In Saga's case, Safran recognized that "we couldn't have gotten into Widespread or Systemic Impact without partners that believed in us and were willing to help change perceptions by sending the message from an impartial third party."

Saga's Journey of Impact Continues

Reflecting back, Safran shared that part of the rationale behind Saga's expansion into Widespread and Systemic Impact was a realization that "we can never be our best selves and achieve our greatest impact by only growing through Direct Impact."

Amid the pandemic, Saga achieved significant growth through its Widespread and Systemic Impact work. Since launching its Widespread Impact work in 2020, Saga Coach has been used by 3,000 individuals, Saga Connect has supported 10,000 learners, and Saga Curriculum has been downloaded by 25,000 users. Additionally, Saga has begun consulting work with districts, cities, and states across the country. And on the Systemic Impact side, the U.S. Department of Education highlighted high-impact tutoring as an evidence-based approach to address COVID-19 learning loss, citing research on Saga's model, and President Biden made a national call for tutors in his inaugural State of the Union address a first for a president.

Saga's commitment to student outcomes and constant curiosity enables it to continue to innovate and improve outcomes for more students across the country.

Endnotes

- ${\sf John\,Kania,Mark\,Kramer,and\,Peter\,Senge,\,"The\,Water\,of\,Systems\,Change,"fsg.org,May\,2018,https://www.fsg.org/resource/2018,https://www.fsg.$ water_of_systems_change/.
- Direct language from Saga leadership, April 27, 2022.
- $"Dr.\,B.\,(Bo)\,Paulle,"\,University\,of\,Amsterdam,\,https://www.uva.nl/en/profile/p/a/b.paulle/b.paulle.html.\,Some\,organizations\,use$ the term "high-dosage tutoring" instead of "high-impact tutoring."

Acknowledgments

Thank you to New Profit and the Bill & Melinda Gates Foundation for their financial support of this project.

We are grateful to Saga's Co-founder and CEO Alan Safran and Co-founder and Chief of Marketing and Communications AJ Gutierrez for their time and thoughtfulness in co-creating this case study.

We would also like to thank Lerner Communications, Alyssa Schwenk, Abby Marco, Zoe Campbell, Julie Nguyen, and Amber Walker for shepherding and disseminating this work, Super Copy Editors, and Five Line Creative for graphic design.

The contributions of these individuals significantly enhanced our work; any errors in fact or analysis are the responsibility of the authors alone. Findings and conclusions expressed here do not necessarily reflect positions or policies of the funders.

About the Authors



Christine Wade

Christine Wade is an associate partner at Bellwether Education Partners in the Strategic Advising practice area. She can be reached at christine.wade@bellwethereducation.org.



Alex Cortez

Alex Cortez is a partner at Bellwether Education Partners in the Strategic Advising practice area. He can be reached at alex.cortez@bellwethereducation.org.



About Bellwether Education Partners

Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.



About New Profit

New Profit is a venture philanthropy organization that backs social entrepreneurs who are advancing equity and opportunity in America. New Profit exists to build a bridge between these leaders and a community of philanthropists who are committed to catalyzing their impact. New Profit provides unrestricted grants and strategic support to a portfolio of organizations led by visionary social entrepreneurs to increase their impact, scale, and sustainability. It also partners with social entrepreneurs and other cross-sector leaders to shift how government and philanthropy pursue social change to ensure that all people can thrive. Since its founding in 1998, New Profit has invested over \$350 million in 130+ organizations and, through the America Forward Coalition's collective advocacy efforts, has unlocked over \$1.7 billion in government funding for social innovation.

© 2022 Bellwether Education Partners and New Profit



This report carries a Creative Commons license, which permits noncommercial re-use of content when proper attribution is provided. This means you are free to copy, display and distribute this work, or include content from this report in derivative works, under the following conditions:



Attribution. You must clearly attribute the work to Bellwether Education Partners and New Profit, and provide a link back to the publication at http://bellwethereducation.org/.



Noncommercial. You may not use this work for commercial purposes without explicit prior permission from Bellwether Education Partners and New Profit.



Share Alike. If you alter, transform, or build upon this work, you may distribute the resulting work only under a license identical to this one.

For the full legal code of this Creative Commons license, please visit www.creativecommons.org. If you have any questions about citing or reusing Bellwether Education Partners or New Profit content, please contact us.