

A Pragmatic Playbook for Impact

Direct, Widespread, and Systemic

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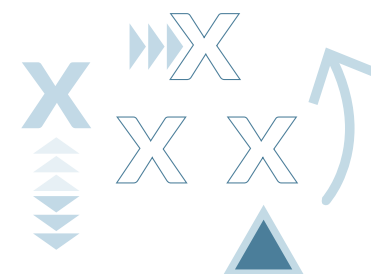
uAspire

Introduction

As 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



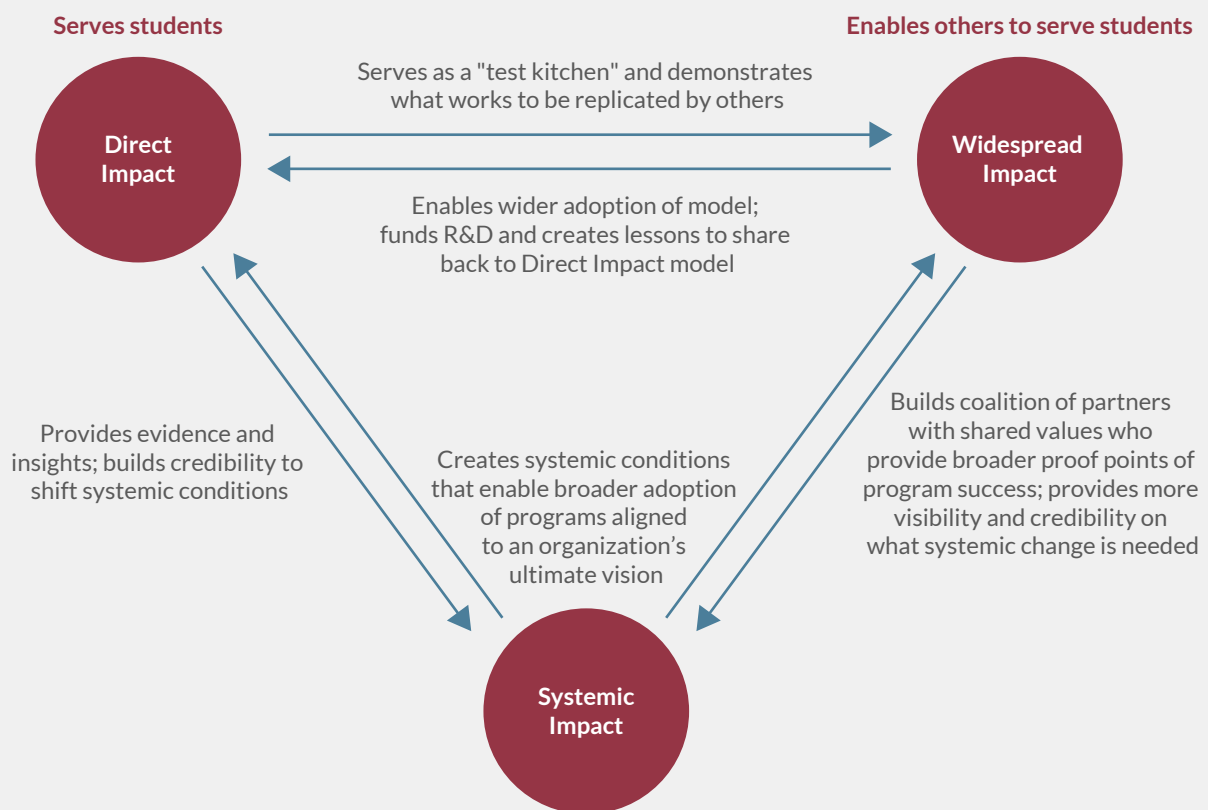
This is one of three case studies that accompany the report, A Pragmatic Playbook for Impact: Direct, Widespread, Systemic. Case studies of the other two organizations, Envision Education/Envision Learning Partners and Saga Education, can be found on our website.

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.

uAspire, a leader in supporting students' postsecondary financial aid navigation, is a proof point for how organizations can expand from one to all three impact strategies over time in a way that allows each to amplify the other, to be well managed, and to be well measured.

Figure 1 Reinforcing Benefits of Direct, Widespread, and Systemic Impact Strategies



uAspire's Roots in Direct Impact

uAspire's mission is "to ensure that all young people have the financial information and resources necessary to find an affordable path to and through college."² uAspire's "singular focus is on college affordability and removing financial barriers so that every student has an equitable opportunity to graduate from college and succeed in life."³

What began in 1985 as ACCESS, a college financial aid advising program for Boston's college-bound students, evolved into uAspire's Direct Impact model that involves one-to-one advising for students in California, Massachusetts, and New York City. uAspire college affordability advisors partner with students beginning in grade 11 to help them find an affordable postsecondary option and successfully enroll in an institution of higher education (IHE). Students are then supported through four years of uAspire advising via text messaging while in college to build knowledge and skills to persist, access financial aid resources, and afford to graduate.

Looking Beyond Direct Impact Work at uAspire

By 2012, uAspire supported nearly 5,500 students across 55 high schools in two states. While its Direct Impact model had strong results and demand for continued growth, uAspire realized the cost of its model would ultimately limit its pace and scale of impact. CEO Jaclyn Piñero noted, "School districts didn't have the capital to enable uAspire to hire at the pace that we knew students needed us."

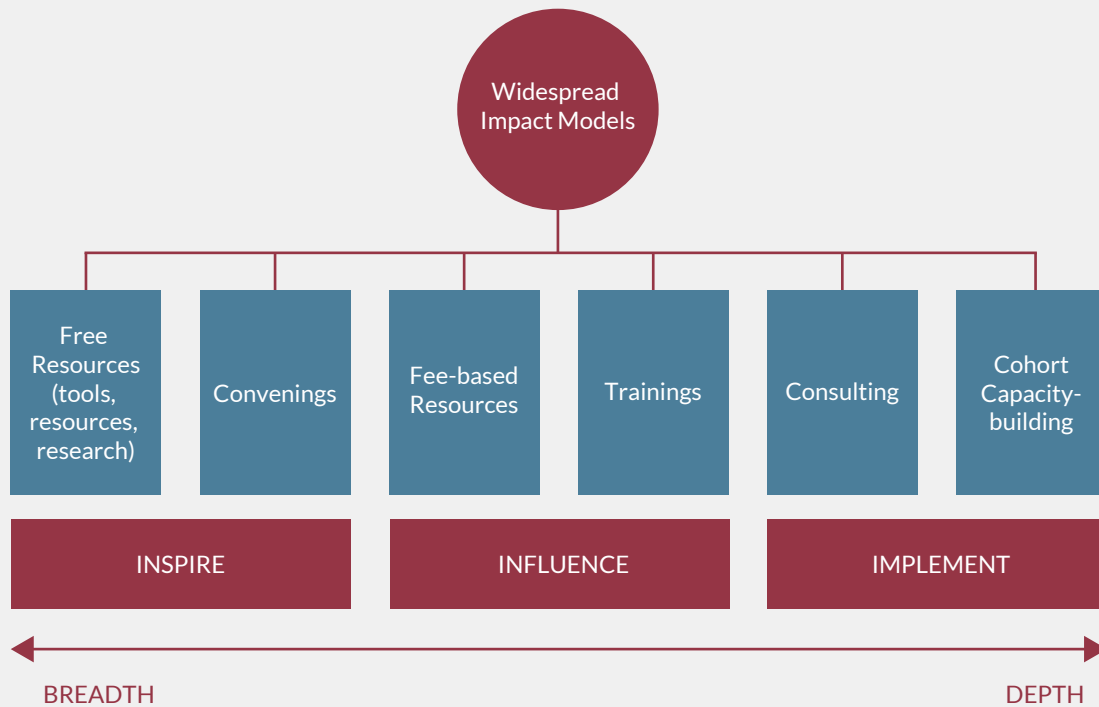
This sparked uAspire's initial entry into Widespread Impact in 2013 through its College Affordability Training and Technical Assistance for school counselors and college access providers.

uAspire'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.

uAspire is a case study on how an organization can balance breadth and depth of impact by focusing on the middle of the spectrum, offering training to school counselors and college access providers (Figure 2, Influence).

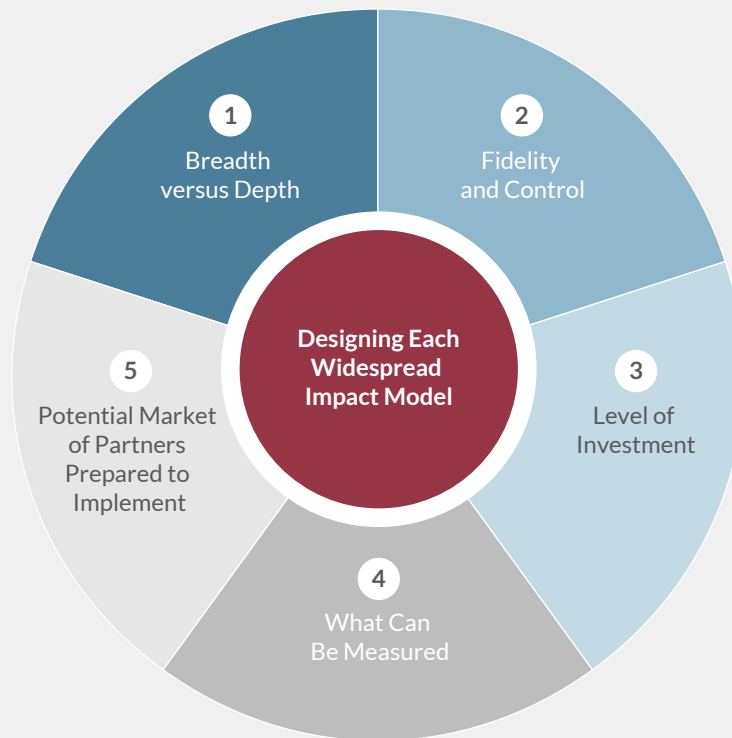
Figure 2 Widespread Impact Models



uAspire’s school counselor and college access provider training is built on a proprietary curriculum used to support students via its Direct Impact work. The organization’s goal with this Widespread Impact strategy is to build capacity and expertise of other student-facing stakeholders to deliver quality financial aid guidance to the students they serve. To achieve this, uAspire offers courses to help counselors and advisers do things like better understand financial aid processes, assess a student’s individual needs, define and demystify jargon, and help students make comparisons and informed decisions. uAspire works with each partner to identify which courses will be most valuable to them given existing expertise and need. In addition, uAspire offers partners access to a college cost calculator and partner portal that provides additional resources, videos, and the ability to ask questions.

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

Figure 3 > Five Decisions in Designing Each Widespread Impact Model



- 1 Breadth versus Depth:** uAspire landed on a Widespread Impact model in the middle of the breadth versus depth spectrum (Figure 2) because, on the one hand, it knew that many school counselors and college access organizations already have access to breadth offerings (free resources, or “the basics”) and that what students and their advisers need is something more to successfully navigate a complex financial aid process. On the other hand, uAspire wanted to reach as many partners and students as possible. To do this, it prioritized the most important things for counselors and advisers to learn and implement – honoring the existing skills and relationships these partners bring to the table while also understanding the systemic capacity constraints on counselors who also feel the pressure to “be everything” for students. As uAspire’s Chief Impact Officer Janeira Forté noted, “We begin with an assessment and conversation around their needs, and then we offer training from an a la carte menu of options,” with the idea of meeting partners where they are.

- 2 **Fidelity and Control:** uAspire’s Direct Impact model is designed to help students adhere to fidelity required from the broader federal and state financial aid systems — if students don’t properly fill out forms and submit them correctly, they won’t receive the financial aid needed to complete college. Piñero noted that uAspire spent a lot of time identifying and refining its approach to “building out curriculum and training that will actually make a difference for students and families in accessing and utilizing financial aid.”

uAspire’s Widespread Impact model is designed to help counselors and school staff support students to successfully navigate this complex process. Part of a meeting-partners-where-they-are approach is supporting their understanding of what must happen while allowing them flexibility in how they support students to achieve it. As Forté put it, “We are giving partners the tools, information, and knowledge they need to then apply within the context of their own college-going culture, how their school or campus operates, and how they already work with and engage students.”

- 3 **Investment:**

- a. **uAspire investment:** uAspire rolled out its Widespread Impact model with limited initial investment because it leveraged its Direct Impact core program model and curriculum. Over time, uAspire made investments in the technology and team supporting its Widespread Impact work, and in continuous improvement and innovation to their model, such as piloting different virtual engagement platforms and adding state-specific content to training.
- b. **Partner investment:** Because of its a la carte training menu, uAspire supports partners with a wide range of willingness or ability to invest. However, Piñero noted that partners often opt in for one training course first: “Starting in the place that they know they need the most help, and then their socks are knocked off when the value of their investment is quickly realized because of the quality of our team and content, so they come back for more.”

- 4 **Measurement:** uAspire has always worked hard to track and measure its Direct Impact and use what it learns from that data to continuously improve. In launching its Widespread Impact model, uAspire knew that, like many organizations, it would need to navigate trade-offs in its ability to measure impact, particularly when it comes to student outcomes.

In developing its Widespread Impact model, uAspire determined ways to measure inputs, outputs, and some outcomes to support its partners and help manage and maximize fidelity of implementation and student impact (Table 1).

In reflecting on uAspire’s Widespread Impact measurement journey, Forté advised: “The reality is that when you’re moving into Widespread Impact, you may have to be OK with reporting on some *outputs* as opposed to *outcomes*. And that’s not always a bad thing. We have been conditioned to think of outputs in more of a negative light. But the fact that we’re able to bring this knowledge to a broad group of individuals says a lot in and of itself.”

Table 1 Examples of uAspire’s Widespread Impact Measures

Inputs	Investment in time, talent, and money	<ul style="list-style-type: none"> • Training team as a percentage of the full organizational budget. • Number of training sessions performed by each staff member per year.
Outputs	Reach and engagement	<ul style="list-style-type: none"> • Number of school counselors and college access providers trained (and number of students served by those individuals).
Outcomes	Satisfaction	<ul style="list-style-type: none"> • Satisfaction of content, facilitation, tools, skills acquired, etc., gathered via surveys.
	Knowledge	<ul style="list-style-type: none"> • Percentage of knowledge gained measured by a pre- and post-test (uAspire trainers go through the answers together with practitioners as a learning opportunity).
	Attitude	<ul style="list-style-type: none"> • Counselor and college access provider confidence (post-training) in working with students on financial aid advising and college affordability. <ul style="list-style-type: none"> > As Piñero noted, “Confidence is critical to support students to navigate a technical and at times overwhelming process.”
	Action	<ul style="list-style-type: none"> • Annual outcomes survey to partner counselors and advisers to measure actions, including the extent to which: <ul style="list-style-type: none"> > uAspire’s training helped practitioners and their teams provide students with deeper and more accurate advising. > Practitioners demonstrate expert-level skills in navigating students’ special circumstances (e.g., undocumented students, loss of employment, COVID-19-related situations).

uAspire’s ability to measure actions (the next best thing to student performance) is a more recent focus. uAspire finds the ability to measure these levels of outcomes helps its team identify what works in training and also target specific areas for improvement. As Forté reflected, “We wanted to be able to see if the behaviors of our practitioners were changing. We wanted to know, once they completed the training, did that correlate to them completing more FAFSAs [Free Applications for Federal Student Aid] with their students or working with their students on the different financial aid topics? So we administered this outcomes survey, and we were able to obtain deeper data and understanding.”

As it looks to the future, uAspire will continue to prioritize effectively and efficiently gathering data to inform its work and demonstrate impact for team learning, to inform systems change, and to attract stakeholder and funder attention to this area of work.

- 5 Target Market of Partners Prepared to Implement:** As uAspire considered scale through Widespread Impact, transferring knowledge captured in its Direct Impact program to existing counselors and advisers already connected to students removed a layer of cost (uAspire hiring advising staff) and complexity (adding layers to an already complex system for students to navigate). This streamlined system enables individuals working with students to build and maintain personal relationships, an important component of uAspire's model. And it better positions uAspire to serve a large potential target market via its Widespread Impact work for the foreseeable future.

uAspire's Journey Into Systemic Impact

uAspire was founded to support students in the face of systemic challenges, but it wasn't until 2017 that it first introduced its Policy and Systems Change team. This expansion came out of uAspire's strategic planning process, where Piñero understands the team felt: "that while our Direct and Widespread Impact work were and remain very important, it's the systems change work that is going to stop students from having to come back to us year after year for the same problems. And it made sense for us to play a role because we are technical experts and systems change requires a deep level of technical knowledge to be able to come in and look at systems and really be able to recommend and push for changes."

Given its Direct and Widespread Impact work, uAspire maintains a strong understanding of student, counselor, and adviser pain points and uses that expertise to shape its systems change agenda. Forté noted, "Policy really sits at the intersection of our other impact models and is heavily informed by our students' and practitioners' lived experiences."

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

Which systems? uAspire began with a focus at the federal level in 2017 and has expanded to have a policy presence in each state where uAspire directly advises students (California, Massachusetts, New York), leveraging the unique perspective on state financial aid policy held by its advising and training teams. Piñero noted: "The original design of our policy and systems change work focused at the federal level. That's the biggest funnel, right? The most power that has control over what we do, control of how our students experience the financial aid world, etc. We had a lesser degree of focus at the state level. As we've continued, we've seen the impact state financial aid policies and resources have on our students, and so are now also working on state policy in California, Massachusetts, and New York."

uAspire's state-level focus includes state policy and outreach to IHEs.

What change do you seek? uAspire’s goal is to transform financial aid systems to “help rather than hinder college degree attainment.”⁴ uAspire’s [policy priorities](#) emphasize equity, transparency, and simplicity to build a financial aid system where students who are first-generation, from low-income backgrounds, and/or students of color can obtain a college degree without taking on burdensome debt.

How is that change achieved? uAspire takes multiple approaches to systems change, including:

- a. Publishing reports and policy recommendations (rooted in lessons learned from its Direct and Widespread Impact work).
- b. Advocating for legislation and budget items that advance its policy recommendations.
- c. Running a Student Advocacy Fellowship to partner with students who have lived experience with the financial aid system.
- d. Partnering with others in state and national coalitions.
- e. Supporting student-centered policy implementation.

For example, at the national level, uAspire’s 2018 “[Decoding the Cost of College](#)” report analyzed thousands of financial aid offers received by students through the organization’s Direct Impact work. The analysis highlighted a lack of consistency and transparency across financial aid offers, and it enabled uAspire to develop its policy priorities and recommendations around simplification, transparency, and equity. uAspire’s credibility and expertise, coupled with its actionable policy recommendations, led to opportunities to work with IHEs in multiple states to redesign financial aid packages and make communication more student-centered.

At the state policy level, uAspire’s advocacy work contributed to the passage of Assembly Bill (AB) 469 in California in 2021, which requires all schools to confirm students submit the FAFSA or California Dream Act financial aid form.⁵ uAspire sees its next steps in California policy as supporting the implementation of this bill, in part by supporting students, counselors, and advisers through its Direct and Widespread Impact work. Forté noted, “In continuing to evolve our Systemic Impact model, we thought that it was really important to add policy implementation — to make sure policy changes are implemented in a student-centered way.”

Who else needs to be involved? uAspire is a huge believer in partnerships. As Forté shared, “We’re in federal and state coalitions, bringing our student- and practitioner-centered perspective to build strong partnerships to advance policy change.” uAspire works in coalition with advocates across the country to call for increasing the federal Pell Grant and expanding resources to meet students’ basic needs. At the state level, uAspire is working in collaboration with California partners to pilot implementation of AB 469. In Massachusetts, uAspire is in partnership with a coalition to advocate for legislation to ensure that college students can access transcripts from semesters they have paid for, even if they still owe payment on their most recent semester’s bill.⁶

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

uAspire continues to grow its Direct Impact work alongside its Widespread and Systemic Impact strategies. After initially launching the Widespread College Affordability Training for school counselors and college access providers in 2013, uAspire expanded its Direct Impact coaching to the Bay Area (2014) and New York City (2018), and also expanded to serve high school students to and through college (2014).

uAspire deeply values its Direct Impact work as an ongoing source to maintain its technical expertise and pilot new innovations. During the same period of its Direct and Widespread Impact expansion, uAspire improved its Direct Impact programming by adding advising via text messaging (an efficient and effective way to provide substantial, personalized support virtually from someone students trust) and gathered additional evidence of impact through external evaluations.

More recently, at the onset of the pandemic, uAspire realized it needed to increase flexibility in its Direct Impact model to best meet students' needs. Forté noted: "The pandemic really highlighted the fact that we needed to be able to meet our students and our families where they were in the moment. So we created a more flexible menu of advising."

While meeting students where they are is incredibly important, uAspire also acknowledges it doesn't expect its flexible programming to lead to the same level of outcomes as the organization's original model. Piñero underscored that, as an organization, uAspire must learn to be comfortable with this dynamic: "With flexible advising, we're not going to get the same outcomes as with our original Direct Impact model. But that's OK, and we will maintain our original direct service corps for a certain number of students where we will have the deep data and metrics, knowledge, and outcomes we need to maintain our technical expertise. But this problem in our country just continues to grow for more and more students every day, so we need to be flexible and let go of some control. And that's a culture shift for our organization, making this new kind of expansion and flexibility more palatable."

uAspire sees the potential impact this continued iteration on its Direct Impact model can have on its Widespread Impact work. By updating the curriculum and testing via its Direct Impact model, uAspire will be well positioned to roll out the same high-impact updates to its Widespread Impact partners. Additionally, the continued proof points and insights gathered from expanding uAspire's Direct and Widespread Impact models can then continue to influence where and how it invests in long-term Systemic Impact.

Balancing uAspire's Direct, Widespread, and Systemic Impact Strategies

uAspire considers multiple factors in determining how to balance energy and resources across the three impact strategies:

Organizational structure: To support appropriate balance across impact strategies, Piñero revamped uAspire’s organizational structure (more on this below).

Financial sustainability: Additionally, uAspire’s team balances its mission-driven approach with the everyday management and operation of the organization’s business side. Piñero commented on how uAspire considers: “how much to put where, who is going to pay for it, market demand ... it comes back to the breadth-versus-depth question – we will be able to give you more when you pay for it ... it’s just a fact of life that revenue has to be part of the strategic conversation. You have to have a team that can have those conversations and understand the role that revenue needs to play in making choices.”

These financial considerations also matter in an organization’s ability to be proactive and make investments. Piñero acknowledged: “We are in a very healthy financial position, and so we will be able to make some really important investments in our strategic plan next year. We can buy ourselves time to test market feasibility, to test pricing and who will pay for things. But when nonprofits are not in this position, they have to be reactive to who is going to pay for it, how it is going to be sustained – and that might not be the tough choice you want to make, but you have to keep the lights on and your people paid.”

Partnerships: As noted above, uAspire is also conscious of the importance of partnerships and taking a holistic ecosystem perspective. Piñero noted: “We have to pay attention to where the need is and what expertise we have to meet that need versus other players in the space that we could partner or collaborate with. Organizations need to really center the needs of the students that they’re serving and focus on what they [as an organization] do well, then build really strong partnerships to do more for those students – rather than thinking about using more resources to build it on their own.”

While striking a balance is important, uAspire is also focused on how each of the impact strategies complement and reinforce each other. Over the course of its history, uAspire expanded from Direct Impact into Widespread Impact and then Systemic Impact work, with each building on the other. Today, uAspire is even more attuned to how its Systemic Impact work creates implications for its Widespread and Direct Impact strategies.

According to Piñero: “If we’re starting at the systems level, we must consider the implications that has for our approach to Direct and Widespread Impact work. For example, when working toward a particular piece of legislation at the Systemic Impact level, we must also consider what it means to support implementation of that legislation via our Widespread and Direct Impact work. How do we make ourselves fit what is going on at all three levels at the same time?”

This also influences where uAspire focuses geographically. Piñero added, “As we think about growth, we are homing in on FAFSA-mandatory states, and that is aligned across impact models ... students in every state need support, but [in these states] there’s clear direction, and legislators have already put political power and decision-making behind these policies.”

Organizational Implications of uAspire’s Expansion Into Widespread and Systemic Impact Work

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

Placing a senior leader across all three strategies: As alluded to above, Piñero thoughtfully restructured uAspire’s leadership team to support work across all three Impact strategies. Piñero noted: “Previously, we had the chief program officer and the chief policy officer, and they were two separate leaders. What was predicated on those two things being less siloed was the leadership of those two individuals, making sure that they came together and were constantly talking to each other — and that’s hard. Now it’s our chief impact officer’s wholesale responsibility to oversee the interaction of our three impact models, how they build upon, learn from, and grow from each other. And she has [direct reports] in place who are strong leaders so she can stay at that higher level and see the intricacies across models.”

Elevating measurement in the organizational structure: During the restructuring, Forté noted that uAspire also “elevated the research, evaluation, and design team and invested in that team to measure across all of our impact models.” This team was moved under another new role, chief knowledge officer, who sits on the senior leadership team next to the chief impact officer (Piñero described these two leaders as “attached at the hip”). The team’s role was also expanded to take data analysis off the plates of advisers — which enabled a broader, integrated perspective of trends and opportunities across all Direct and Widespread Impact work. These structural changes enabled uAspire to embed the use of data to inform decision-making throughout its culture.

Considering implications each impact team has on the others: As uAspire makes shifts within and between strategies, leadership keeps a close eye on implications across the organization. Piñero shared: “It’s important to consistently pay attention not only within individual impact approaches, but also to consider the implication making a change in one has on the others. For example, in implementing a state-based policy approach within our Systemic Impact work, we are also adding people to our Widespread technical assistance training team that will be specific to our states of focus.”

Emphasizing change management and communications: While organizational structure has had a significant impact on uAspire’s success and ability to continue evolving, leadership recognizes the importance of change management and communications to bring the whole team along on the journey. As Forté noted: “Change is difficult for everyone. Change management is something that has been key, and our leadership team has put a lot of focus and investment into it to ensure the success of our students.”

Some examples of how uAspire has thoughtfully implemented change management and communications include:

- **Using organization-wide meetings:** uAspire’s organization-wide meetings now include a regular CEO update that provides insight into the work of all three impact strategies and how they reinforce one another. This approach enables the team to see the big picture of their work and impact, and it increases a sense of camaraderie and buy-in.
- **Setting clear expectations:** As the overall scope of work uAspire is taking on grows and shifts, Piñero sets clear expectations for the team: “Our organization is changing and shifting, and it’s important that everybody has responsibility and accountability for it — which for us has included a big focus on updating and clarifying job descriptions within and across teams.”
- **Investing in transparent communications:** Piñero reflected that as the team continues to grow across strategies, particularly in a virtual environment, “we need stronger, deeper, transparent communications systems — so we are going to be resourcing our internal communications team more to help build relationships and reduce silos.”

uAspire’s Reflections for Leaders Beginning the Journey to Widespread and Systemic Impact

Here are Piñero and Forté’s lessons learned from uAspire’s journey into Widespread and Systemic Impact:

Know your “why” in expanding impact strategies: Piñero asserted the importance of being clear in the “why” for expanding into Widespread and Systemic Impact work, and that the “why” should be rooted in impact and solve for a need. She suggested organizations considering expansion into Widespread Impact first conduct a detailed and timely needs analysis (that includes perspective from those who would be served) to “ensure your entry into Widespread Impact is driven by solving for a real need, and not due to the many pressures organizations can face to grow or expand [such as from funders or an organization’s board].”

Include the voices of the “implementers” and community stakeholders (e.g., students): Forté noted that, “As leaders of organizations, it is really important for us to include the voices and experiences of those who are closest to the work — those implementing our model and the students we serve — because they are the experts and they know best what may or may not work.” She noted that uAspire has several structures in place to ensure a range of voices are always brought to the table, such as internal leadership groups and student focus groups.

Embrace learning: Piñero shared that a spirit of learning and continuous improvement sits at the forefront of all that uAspire does — and in order to learn, an organization must prepare to embrace both successes and failures: “It’s going to be messy. We have to be OK with mistakes and failures. Part of the change management is acknowledging, ‘It’s okay, we’re going to fail, we’re going to make wrong decisions, and then we’re going to right the ship — but we’re never going to arrive.’ We’ve arrived when we don’t need to exist anymore. But until then, it’s a constant plan to do things differently and support the organization to try new things and make mistakes because that’s really what’s going to help us learn and grow.”

uAspire’s Journey of Impact Continues

uAspire is aware that, to achieve its mission, it must continue to grow all three of its impact strategies. In the 2020-21 school year alone, uAspire served 10,700 students directly but reached more than 312,000 students nationally through the 3,700 college access professionals trained via its Widespread Impact model. The organization estimates that nearly 170,000 students were impacted by its Systemic Impact work.⁷

uAspire’s dedication to meeting its partners where they are and its thoughtful approach to organizational structure and culture, financial sustainability, and impact measurement enables its impact strategies to continue extending to hundreds of thousands of college-going students across the country.

Endnotes

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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.

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