



the David  
Lucile & Packard  
FOUNDATION

# Seven Years of Summer

The Story of the Packard Foundation's Catalytic  
Investment in Summer Learning in California

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# A Note from the Packard Foundation

The David and Lucile Packard Foundation has been committed to improving the lives of children, families, and communities for more than 50 years. During that time the Foundation has funded direct service programs, advocacy and policy development, research, and communications in an attempt to improve practice, advance good policy, build evidence, and inform the field. But as any philanthropist knows, the challenges of the world cannot be solved by foundations alone. Therefore we continually ask ourselves, “How can we invest in ways that will truly make a difference?”

This report explores that question. It tells the story of the Foundation’s decision to play a catalytic role by adopting an intentional, seven-year time-limited strategy to launch a statewide movement for expanded summer learning and to help build an infrastructure to sustain that movement for years to come. Over those seven years, it braided together strategies for improving practice, building support systems, and informing policy to enhance summer experiences for children throughout the state.

What does it mean to be catalytic?

For the Packard Foundation, it meant embracing our core value of “thinking big”—capitalizing on a state policy change of new funding for after-school programs. The goal was to embed quality summer learning programs as part of that new education landscape that already included after school. It also meant setting the expectation that our investment would be time-limited and focused on field building and on strengthening system capacity within state and local education agencies.

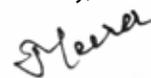
After seven years and more than \$31 million invested, we see an increase in the cadre of education leaders who view both after-school and summer enrichment as necessary ingredients of educational success, a marked improvement in program quality, and advocates and program providers who are continuing to work together to sustain this progress and take it to the next level.

We offer this reflection on our work as one example of a catalytic response to strategy development and implementation. Our hope is that other funders might find this helpful and that perhaps it may start a conversation about the rewards and challenges of such an approach. We hope this report will:

- Spark conversations about using a catalytic approach to grantmaking within your own foundation;
- Move you to reflect on your own work and look for ways in which you might pivot and leverage existing knowledge, partners, and strategy to advance your goals; and
- Help elevate the conversation among philanthropic peers about when and how to adopt time-limited strategies.

And because our work only gets better when we learn from our peers, we welcome your stories of using a catalytic approach in philanthropy as well.

Sincerely,



Meera Mani, Director  
Children, Families, and Communities  
The David and Lucile Packard Foundation



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# In Pursuit of a Meaningful Summer



What if summer could be more meaningful for children and their families? More specifically, what if enriching and engaging learning experiences could be a part of every summer, just like warm breezes and fireflies?

Countless reports show that a “summer slide” occurs in terms of academic achievement for many students, particularly those from low-income communities. As students continue through school, repeated summer learning loss results in a growing achievement gap between students who have meaningful summer learning experiences and those who do not.

What might happen if those high-quality summer learning experiences were available every summer, for every child? No sitting around the house playing video games. No stuffy classrooms for boring remedial lessons. Instead, plenty of fresh air, sunshine, friends to learn with, places to go, and fascinating things to think about.

This is what the David and Lucile Packard Foundation asked itself in the mid-2000s—and those questions led to a seven-year investment in summer learning in California, from 2009 to 2016. Rather than simply funding the expansion of summer programs over those seven years, the Foundation instead created a strategy focused on building a “scaffolding” or infrastructure for the summer learning field—with the hope that the field could continue to grow and expand long after the Foundation’s financial support was gone.

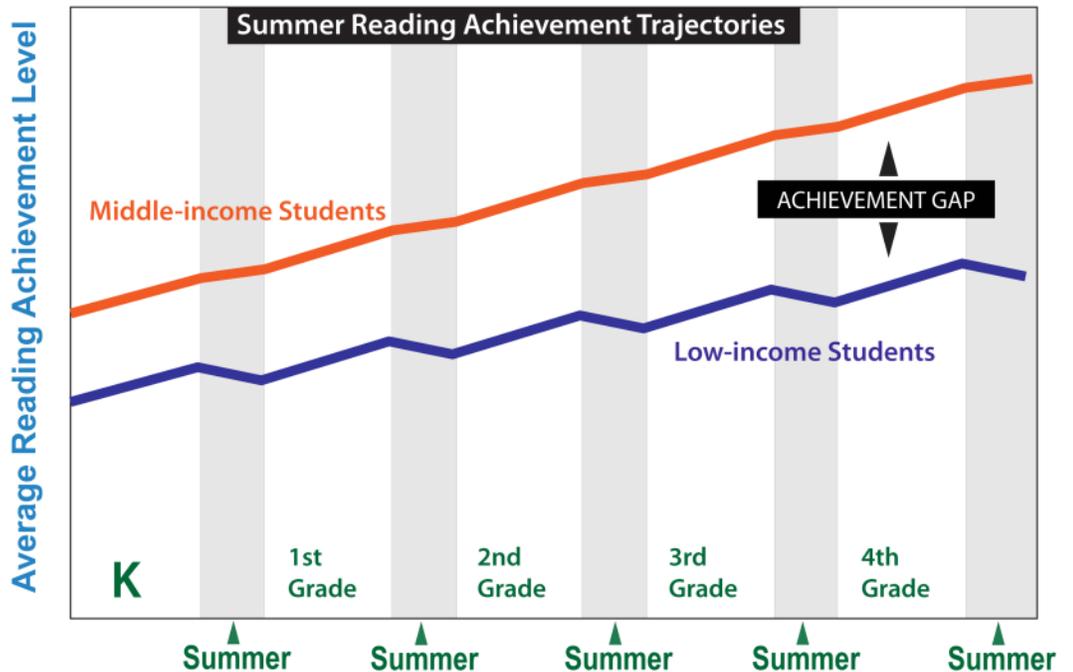
This strategy was a new one for the Packard Foundation and for the grantees and partners it engaged, because of both the scaffolding approach and the fact that it intentionally limited the time frame for its investment from the outset. And as with every new endeavor, there was plenty to learn along the way.

# Why Summer Learning?



By the time a low-income child enters the fifth grade, he or she is likely to be as many as three grade levels behind other classmates in terms of reading, math skills, and other knowledge. One key contributor to this gap is the absence of learning opportunities during summer months, which results in learning loss. While wealthier peers attend summer camps or enrichment programs, or travel with their families, low-income youth are less likely to have opportunities to engage in activities that provide ongoing learning. This disparity in opportunity translates into an ongoing achievement gap. In fact, according to the National Summer Learning Association (NSLA), about two-thirds of the achievement gap in ninth grade can be attributed to unequal summer learning opportunities during the elementary school years.

Physical health can suffer during the summer as well. Most children gain weight more rapidly during those months, and that weight gain is particularly pronounced among children of color.



## The Perfect Pivot Point for the Packard Foundation

The Packard Foundation's understanding of the importance of summer learning—and its ability to enter the summer learning field in a significant way—evolved from years of investment in after-school programs and the overall system of public funding and technical assistance for after school in California.

In 2002, California voters passed Proposition 49, which expanded the state's After School Education and Safety Program (ASES) and earmarked a portion of state funding for before- and after-school programs beginning in 2007. The Packard Foundation supported the implementation of new after-school programs, including a focus on creating a technical assistance infrastructure for the field. In 2008, the Foundation created ASAPconnect, an organization that coordinates a network of expanded-learning technical assistance providers throughout California. ASAPconnect engaged experts who could help train, coach, and support after-school program providers. During this time, the Foundation was also supporting the Partnership for Children & Youth (PCY), a nonprofit advocacy and intermediary organization that was integrally involved in developing and promoting statewide policy around implementation of the Prop 49 funding.

From 2006 to 2010, the Foundation worked closely with the after-school field to support this infrastructure and expand to more than 4,000 after-school programs receiving public funds. In 2007, Foundation staff began to learn about summer learning loss and the devastating impact it can have on learning. Although the issue was gaining traction with education researchers, there was no narrative in California or nationally that carried the

message that quality summer enrichment programs could help stem summer learning loss. Armed with insights from its after-school work, the Packard Foundation recognized the opportunity to leverage its knowledge, connections, and social capital to launch summer learning into California's education landscape.

"As we were doing this after-school work, we began to see all the data emerging about summer learning loss, and we realized we needed to invest in summer as well in order to support our after-school gains," says Dr. Meera Mani, director of the Foundation's Children, Families, and Communities program, which houses after-school and summer enrichment investments.

Jeff Sunshine, program officer and manager in the Packard Foundation's Children, Families, and Communities program, describes the pivot to summer as "opportunistic," but in a good way. "We knew this additional investment in summer would be helpful to our overall investment in after-school and improving education outcomes. Otherwise, we would have left it incomplete. It's kind of like pumping up a tire and then finding a leak. It made sense to address that leak before walking away."

In 2008, Foundation staff went into learning mode to understand summer learning loss, what was underway in California and other states to address it, and how it could leverage its existing relationships and infrastructure to provide maximum benefit to the field. Background research, interviews, and listening meetings with practitioners, advocates, and funders were instrumental in developing a new strategy. Along the way, the Foundation

also provided support for key after-school partners, including ASAPconnect and PCY, to shift into summer as well.

By 2009, the Packard Foundation had settled on its strategy for enhancing summer learning in California, and its work began in earnest.

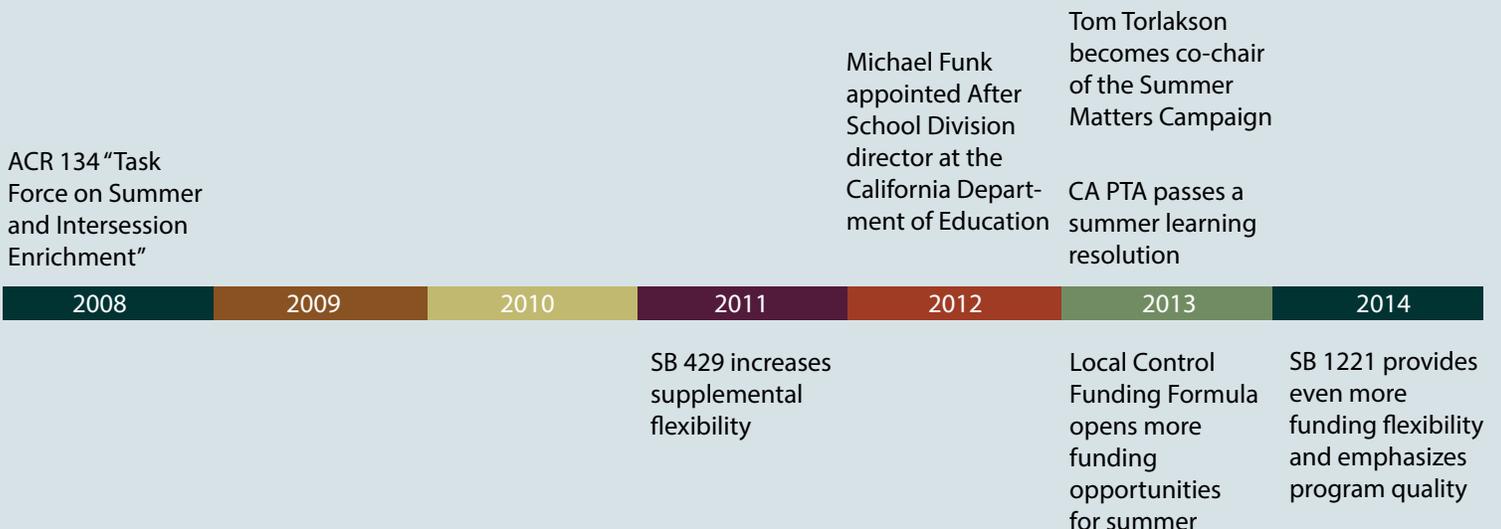


## The Policy and Funding Landscape

Throughout the Packard Foundation’s investment in summer learning, California’s policy and funding landscape shifted in several ways. Initially, public dollars for and commitment to summer programs were scarce—particularly during the Great Recession, when funding for summer school programs nearly vanished—but over time, state resources have become more available. In 2010, SB 798, cosponsored by PCY and the California Department of Education (CDE), designated a portion of 21st Century Community Learning Center (21st CCLC) funds to summer programs. In 2011, PCY continued its legislative work with SB 429, which allowed more flexibility for the use of 21st CCLC funds for summer programming, including increasing the number of hours funded per day.

Under the leadership of State Superintendent Tom Torlakson, CDE has gradually increased its emphasis on after-school time, creating an After School Division in 2012 (now called the Expanded Learning Division) and charging its first director, Michael Funk, with creating a plan to support expanded learning during after-school and summer across the state.

As the Packard Foundation’s engagement in summer learning began, many sites were unaware of the supplemental funding available as part of the state’s After School Education and Safety Program (ASES) and 21st CCLC, which could be used for summer programs. Also, in 2013, California dramatically restructured its approach to public education financing, putting more decision-making authority and accountability into the hands of local superintendents. The new Local Control Funding Formula provided an opportunity for superintendents to allocate more funding for expanded learning programming in their annual budgets. In 2014, PCY and CDE worked together on SB 1221, which allowed even more 21st CCLC funds to be applied to summer programs by prioritizing year-round programming and codifying a focus on quality improvement rather than compliance to rules that had little association with better learning opportunities for students.



# The Packard Foundation's Strategy

The Foundation knew that it could build from its experience in the after-school realm to tackle the challenge of summer learning, but it had several options to explore and key questions to answer as it began to consider its investment. Did it want to push for rapid expansion of summer programs or focus on quality design and implementation? Did it want to invest locally, regionally, or statewide? Should it concentrate on elevating programs, changing policy, or both? Was it better to maintain the structure created in the Foundation's after-school work or develop a new one? And how long should this investment in summer last?



## Decision Point

As it developed its statewide strategy, the Packard Foundation considered taking a city-based approach, focusing on mayors and other champions, but decided instead to build off of its existing after-school networks and relationships.

"When we began planning our strategy, few people understood the importance of a quality summer learning experience, and there were limited funds for summer programs, unlike after-school programs, which had dedicated funding," says Mani. "There was no infrastructure for providers and few advocates. We were starting almost from scratch with a goal of building awareness and support for summer learning, creating an infrastructure of advocacy to push for state policy, and funding to build a robust summer learning culture in California."

"Early in our thinking about our strategy for summer, we didn't consider who the drivers would be of the change we wanted to see with the strategy. That was a flaw," says Justina Acevedo-Cross, program officer in the Packard Foundation's Children, Families, and Communities Program. "We started off with a tipping-point strategy—creating enough quality summer learning sites to tip the scales of funding and policy support. But quality practice alone doesn't drive policy changes; it just begets more practice. So we had to think about drivers—in this case K–12 school districts and their partners—and how to get them to want great summer programs and advocate for funding streams."



## Lesson for Philanthropy

It takes more than practice and programs to build a field. To make catalytic change, you have to identify and support the people and organizations who will become champions for that change.

## Defining Quality

High-quality summer learning experiences are:

- Rooted in enrichment rather than remediation
- Tailored to the academic and social/emotional needs of students to help them gain confidence as learners
- Staffed by caring adults with strong relationships to students
- Anchored in students' communities
- Focused on literacy, physical activity, healthy eating, and making new friends

They encourage students to stretch their thinking and challenge themselves in new ways, provide opportunities for leadership, and help students see school as a place where they can succeed.

## Building A Scaffold



### Voices from the Field

*“Connecting the work of demonstration sites with policy and communications infrastructure is a smart strategy. You can make policy arguments from a place of strength, showing on-the-ground impact. Plus, you can test proposed solutions and adapt as needed.”*

Samantha Tran, Senior Managing Director of Education Policy, Children Now

*“The Packard Foundation built its scaffolding around a primarily publicly funded system, spurring or filling in things that weren’t already happening and supporting innovation at a faster pace in select places. This is a great example of using private funding to leverage a public system for greater impact.”*

Ellen Irie, President & CEO  
Informing Change

For its investments in summer learning, the Packard Foundation worked with its key grantees to design a relatively new approach—a “scaffolding” of support and infrastructure to help the field of summer learning grow across the state. This scaffolding was built on three solid pillars: quality demonstration programs, a network of technical assistance providers for summer learning programs across the state, and targeted communications to engage a broad range of stakeholders and policymakers. From its investment, the Packard Foundation hoped to see a common understanding of the value of quality programs, a broader network of support for creating quality programs, and policies that would prioritize and support the expansion of quality summer learning throughout California.

### GOAL

Ensure that California’s education leaders embrace high-quality after-school and summer enrichment as essential to the overall success of children who need it most.



**1. QUALITY PRACTICE**  
12 target communities with summer learning programs at multiple sites



**2. SYSTEMS BUILDING**  
Technical assistance, training, coaching, and other professional development for summer program staff and TA providers



**3. STAKEHOLDER ENGAGEMENT & POLICY DEVELOPMENT**  
Strategic communications, champion building, and advocacy

*The Packard Foundation’s “scaffolding” approach was built on three distinct, yet intertwined, pillars of support: ten quality demonstration programs, a network of technical assistance providers who support summer learning programs across the state, and targeted communications to build both popular and policy support for quality summer learning.*

# Three Solid Pillars

## 1. Program Quality

A high-quality summer learning experience looks vastly different from traditional summer school. It incorporates a wealth of enrichment activities, group learning opportunities, individual skill building based on topics of interest to each student, and a focus on healthy food and physical activity. Quality programs also last at least a month, to provide enough time for children to enjoy the benefits of their experience. In its summer learning strategy, the Packard Foundation funded ten quality demonstration sites across the state to provide real-world examples of what a quality experience looks like.

“We are providing a very active and engaging experience that didn’t exist before,” says Philip James, coordinator of the Expect Success Summer Camp in Glenn County, one of the Packard Foundation’s ten demonstration sites. “We started with five sites, but now 100% of our 11 school sites are running summer programs that are enrichment-based. Students rotate through various subjects, and it’s all hands-on. We’ve incorporated social-emotional learning as well. Our administrators and teachers have seen the outcomes and have bought into this style of learning. It’s fun, and it supports our students’ growth. That’s huge, and it’s why we’re here!”

The Packard Foundation worked with demonstration programs to create an environment in which they could learn from one another about what worked in their programs, and how to change what did not. Twice a year, PCY and ASAPconnect convened the summer program directors,

## Summer Matters Demonstration Sites



*The Packard Foundation supported ten demonstration sites for quality summer learning programs. Two additional sites with a STEM focus, at Mt. Diablo and Santa Ana, were funded by the S. D. Bechtel, Jr. Foundation.*

site staff, and the technical assistance provider paired with each program to reflect, share strategies, and plan for the next summer. These meetings were described as “absolutely invaluable” for participants.

“In between those in-person gatherings, people were connecting by phone and email to share ideas. As a result, different programs from across the state created a community for learning, sharing, and teaching one another that still exists today,” says Acevedo-Cross.

Superintendents, school board members, and senior staff also learned from one another through peer-led presentations and site visits that were organized by PCY in partnership with local technical assistance and program providers.



### Voice from the Field

*“Our twice-yearly gatherings to hear what others were doing well, where they were challenged, and what opportunities they saw on the horizon were absolutely invaluable.”*

Nazaneen Khalilnaji-Otto, Director,  
Summer Matters Campaign,  
Partnership for Children and Youth



### Lesson for Philanthropy

While tools to measure quality or performance are great, they are not effective if they are too complicated or cumbersome to use. Simplifying for the sake of adoption can be the more prudent strategy.

In an effort to clarify the issue of quality, the Packard Foundation and its grantee partners worked with National Summer Learning Association (NSLA) to create and test a quality measurement tool, the Comprehensive Assessment of Summer Programs (CASP). While the CASP was successful in helping programs pinpoint goals to improve their experiences for children, grantees reported that the tool itself was cumbersome and too lengthy.

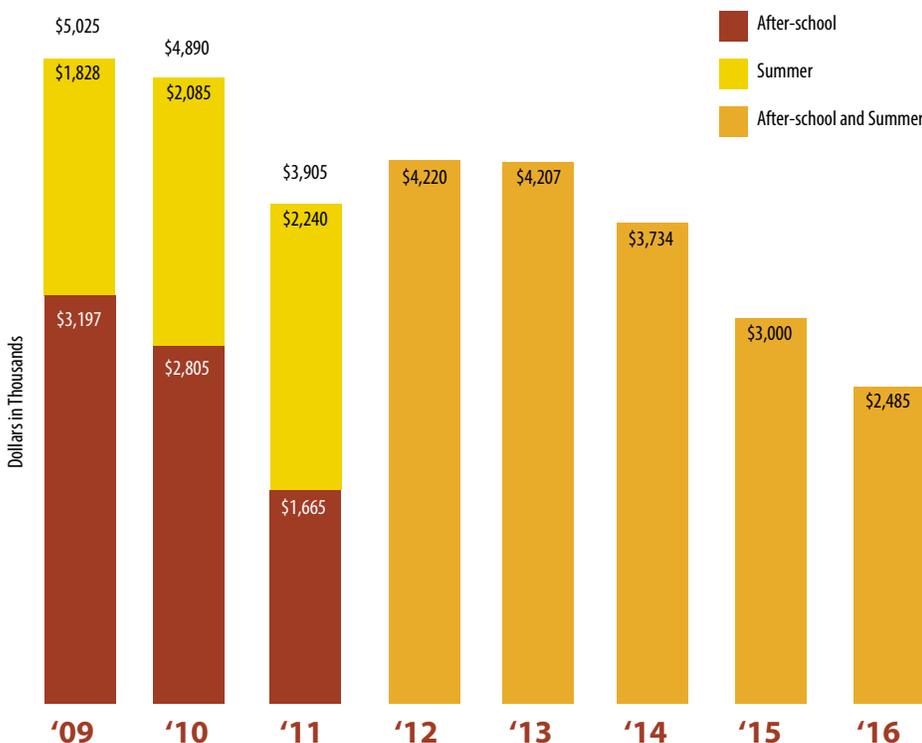
In response, the Foundation supported the NSLA to work with ASAPconnect to create an abridged version, the Quick CASP, that maintained many of the quality indicators in a more simplified process, and California summer programs were the first to pilot it. The QuickCASP is a useful entry point for program providers to objectively assess quality.

## 2. Technical Assistance/Systems Building

The Packard Foundation built on its existing network of after-school technical assistance providers to create a statewide system of providers with summer learning expertise, and it called on ASAPconnect to take the lead role. In addition to helping technical assistance providers in the network offer services such as coaching, training, or mentoring, ASAPconnect also worked with providers to enhance their content knowledge about summer learning's importance, what creates a quality summer learning experience, and how to fund it. As a result, providers throughout the state became not only subject matter experts but also advocates for summer learning.

“Our charge was to build capacity and expand resources and tools for TA providers,” says Diego Arancibia, ASAPconnect’s director. “There was some hesitation on our part at first, but it proved a smart move for us to help fill that gap. Initially, many of the sites we worked with told us, ‘We already run summer programs,’ but they were more like summer school. They needed help combining the rigor of summer school with the magic of camp. Our regional leads and consultants would take them on site visits so they could see the depth of planning involved, and see the shift in kids from saying, ‘I have to go’ to ‘I want to go.’ That was the tipping point.”

## The Packard Foundation’s Total Investment in After-School and Summer Learning: \$31,456,902, 2009–2016



*After initially targeting summer learning as an addition to its after-school investments, the Foundation integrated its grant support as summer learning gained in traction and impact.*

### 3. Stakeholder Engagement and Policy Change

Knowing that state-level policy change would be key to sustaining a growing commitment to summer learning in California, the Packard Foundation invested heavily in communications and advocacy to create champions for summer at every level—from local school districts to the California Department of Education. Summer Matters began as the coordinating link to demonstration programs, TA providers, and advocates. The campaign then built communications infrastructure—like the Summer Matters website, a statewide newsletter, and shared messaging—that became an invaluable outreach medium and resource for educating stakeholders about the importance of summer learning. The campaign quickly grew into a robust hub for resources, tools, success stories, and other information that a growing corps of advocates can use to share the word and expand support.

Today, Summer Matters describes itself as “a statewide network of school districts, educators, school boards, education leaders, mayors, legislators, nonprofits, funders, civic leaders, and parents working collaboratively to create and expand access to high-quality summer learning opportunities for all California students.”

In addition to the campaign approach of Summer Matters, the Packard Foundation staff and key grantees maintained close contact with leaders at the California Department of Education to help inform ongoing decisions around summer—including support for the creation of the After School Division’s 2014–16 strategic

plan, which included actions to expand improved support for summer program providers. Staff from organizations involved in the Summer Matters campaign—including technical assistance providers, program providers, and advocacy organizations—were deeply involved in multiple planning teams at CDE. Their voices ensured that summer learning and the quality improvement process were embedded in the strategic plan.

“Changing the narrative and encouraging Californians to embrace a new concept of summer learning requires much more than a top-down message from state government,” says Michael Funk, director of the state’s Expanded Learning Division. “Having a philanthropic partner in this work allows us to amplify our message and reach further than we ever could on our own. The Summer Matters campaign that the Packard Foundation funded shares the importance of providing quality experiences and the impact that is made when those experiences are in place.”



#### Lesson for Philanthropy

Creating a public awareness campaign brings multiple benefits. It ensures that messaging is consistent, gives multiple stakeholders a sense of common purpose and inclusion, and puts a public “face” on efforts that might otherwise be hidden from view.



# SUMMER MATTERS

## The Power of Partners



### Lesson for Philanthropy

Foundations must assume the lion's share of responsibility for balancing the power dynamics in collaborative efforts. When staff make it clear that they are there to support, not guide, and come to the table as equal partners, there is fertile ground for trust to grow.



### Lesson for Philanthropy

Partnerships with multiple players—especially when addressing a new field or issue—must be fluid in terms of participants, leadership, and roles, and they must be open to adaptations over time.

Of course, no single foundation can effect statewide change on its own. The Packard Foundation staff knew they would need the experience, insight, and support of a number of existing and new partners. The Foundation began by creating a Summer Practice Consortium, bringing three key organizations together to explore and shape the summer learning effort: Partnership for Children and Youth, ASAPconnect, and the National Summer Learning Association.

The Foundation also knew it had to allow the work of partners to evolve organically. While the Summer Practice Consortium started with a focus on creating quality practice, participants soon realized that what they really needed to do was create a narrative for the state that identified the problem of summer learning loss and talked about high-quality summer enrichment as the solution. For that, the Foundation needed a “command central” to guide the work, so it turned to Partnership for Children and Youth to oversee the campaign and work with partners.

As a statewide intermediary for advocacy and for expanded learning organizations and programs, as well as a local TA provider, Partnership for Children and Youth (PCY) was already a player in the summer space, having written and advocated for legislation in 2008 to study summer learning and educate policymakers about its importance. PCY was able to bring its experience in training, capacity building, and advocacy to the summer learning effort. It also built organizational strength to coordinate the statewide communications and public relations work of the Summer Matters campaign.

As the campaign idea flourished, leadership of the effort evolved from the Summer Practice Consortium to a Summer Matters campaign steering committee, which included the original Consortium members plus Children Now, Fowler Hoffman, and eventually California School-Age Consortium, Los Angeles County Office of Education, Monterey County Office of Education, Central Valley Afterschool Foundation, and Butte County Office of Education.

“In 2013, the newly branded Summer Matters campaign was just what was needed to provide a way for summer program providers, TA providers, educators, advocates, and others to know how they could engage in the effort to address summer learning loss in California. It helped to name the big tent and hang a welcome sign out for people to get involved even if they were not funded by the Packard Foundation,” says Acevedo-Cross.

Foundation staff made it clear from the outset that while the Foundation could contribute financial support, technical assistance, and networking connections, it did not have the expertise or knowledge to lead the effort. Instead, Foundation staff would attend meetings and participate as equal partners with its grantees and others. This approach was a departure from a typical funder/grantee relationship for many organizations, and it took time for grantees to learn to trust the Foundation and one another.

The new approach also required adjustment and trust on the part of the Packard Foundation staff. “There was no existing system or players to help us pull this work together. Even our main grantee, PCY, was

still ramping up into the summer space,” says Sunshine. “We also were making large grants to new partners we’d not worked with before. It took time to understand one another and move forward.”

Over the years of the Packard Foundation’s investment, the list of partners, grantees, and champions for summer grew exponentially, and it morphed yet again into a growing statewide Summer Matters network with more than 85 member organizations by the end of 2016.

### **The Challenge of Multiple Players**

The Packard Foundation’s goals for summer learning demanded the inclusion of a wide variety of partners, from statewide organizations to local demonstration programs. These partners brought a diverse range of thought and experience to the

work. For example, ASAPconnect’s expertise in quality improvement, technical assistance, and knowledge of the struggles school districts faced in developing and sustaining high-quality programs helped clarify an effective strategy for building out the technical assistance infrastructure to include summer expertise. The National Summer Learning Association helped the group understand the importance of defining and designing high-quality programs rather than adopting a rapid expansion model in which quality would have been on the back burner. And the Partnership for Children and Youth brought to the table its expertise in both technical assistance to programs and in communication and advocacy to emphasize the importance of summer learning to combat summer learning loss. These multiple perspectives made for a richer



### **Voice from the Field**

*“The Packard Foundation gave us the opportunity to fail. You could talk with them about challenges, and they could see kernels of what could work among what didn’t. And they engaged so many people—partners and consultants—that they couldn’t exercise undue influence.”*

Natalie Cole, former Program Director,  
California Library Association





### **Lesson for Philanthropy**

No matter what their roles or who is leading, all partners in a collective effort want to feel that they are there for mutual enrichment and benefit. Cooperative planning and ongoing communication can help provide clarity about mutual rewards.



### **Lesson for Philanthropy**

Learning from failure is an option. Foundations can pave the way for candor and innovation by pledging that failed attempts or open discussion of challenges on the part of participating organizations won't become a black mark when it comes to future funding.

and more robust approach to promoting summer learning and gave local partners deeper knowledge and broader resources to couple with their own expertise and community connections.

Of course, working with a broad network of partners can bring issues of inclusion and communication to the forefront. Many of those working within the practice consortium and then the Summer Matters campaign steering committee were not certain of their roles or the roles of others.

"At times, it felt that the statewide partners weren't quite as part of the big effort as the communities. It seemed more focused around the communities themselves, and we felt we had to keep demonstrating our value to them," says Natalie Cole, former program director of the California Library Association. "It might have been more effective if there had been more of a sense of mutual enrichment, and that we were all in this together. That would help deepen and strengthen our relationships within the communities."

"There was a lot to manage and filter, so coordinating communication was sometimes a challenge. We had a lot of overlap, and if we could have been more clear initially about roles and deliverables for each entity, that would have been helpful," observes Mara Wold, a regional technical assistance lead. "It also would have been good to know who all of the Packard Foundation-funded summer players and grantees were and what they were responsible for to ensure ongoing and intentional collaboration across all facets of the Summer Matters campaign."

Clarity came when PCY stepped up as the lead entity for the Summer Matters campaign, although even that required ongoing attention to the needs and perspectives of partners.

"Having one partner take the lead on the campaign was difficult at first because it seemed to others that PCY was calling all the shots," explains Acevedo-Cross. "But PCY started a cooperative planning process with all the steering committee partners. They conducted annual gatherings in which all partners would review the past year and set goals and activities for coming year together, as well as identify which organizations would play lead and supporting roles. That, as well as ongoing communication among partners, supplied the clarity for roles and expectations that successful partnerships require. And it allowed all partners to build and maintain trust in one another as they explored new lines of work together."

For its part, the Packard Foundation helped foster trust by being clear about its multiyear commitment, listening carefully, questioning assumptions (its own and those of other partners), and being open to new ideas and adjusting the strategy based on the feedback from grantees. For local sites, the Packard Foundation gained trust by making it clear that quality assessments were not used to make funding decisions and that each site could focus on a few elements of quality at a time rather than trying to hit every mark all at once.

## Time-Limited Investment

Just as notable as its shift in strategy was the Packard Foundation's intention to limit its investment in summer learning to seven years. From the outset, Foundation staff shared a clear message with all grantees and partners that their financial involvement would end in 2016. This decision was partly driven by the Foundation's desire to secure the impact of its investments in the after-school infrastructure, and partly by the understanding that if change were possible, evidence of that change would emerge sooner rather than later.

"We wanted to play a catalytic role that could propel the summer learning field forward by calling attention to summer learning loss. It wasn't enough to simply maintain the status quo," says Acevedo-Cross. "To do that, we needed to create a sense of urgency. Having a defined window of opportunity to improve summer created an 'act now' moment and purpose."

"We knew that if we didn't get where we wanted to be by 2016, we would need to call the question about whether this work was worth doing as a private funder," adds Mani. "By 2016, things were indeed in a much better place. We know the network will go on without us, and the state has indicated a longer-term commitment to

summer learning, so we were able to affirm that it was the right time to exit."

In retrospect, the seven-year investment was plenty of time to demonstrate impact. "The length of time that the Packard Foundation committed to be in this project was really important," says Tina Cheplick, senior consultant at Informing Change, a Bay Area strategic learning firm that served

as the Packard Foundation's evaluation resource for its summer learning investment. "You couldn't learn in two or even five years what they now know about quality and systems change. Their partners also needed that time to see change happening and be willing to step forward and embrace it themselves."

Many individual partners began to see an impact by year three, as staff began to internalize the notion of high quality and how to effect it. But Acevedo-Cross points out that this does not mean the initiative could have been a three-year one. "Moving individual programs to quality is one thing, but if you're seeking larger system change, that requires a longer time. You have to be able to change agencies and districts and partners well beyond those programs. That's when the work becomes catalytic."



### Decision Point

The choice to make a time-limited investment forced the Packard Foundation to co-create outcomes and push toward them. Otherwise, it would have been easy to get caught up in providing ongoing support without real momentum for change.



### Lesson for Philanthropy

When a foundation is clear and up front about the time limits of its commitment, it not only manages expectations on the part of grantees but also infuses the work with a sense of positive urgency to make big strides in the moment, which in turn can help continue momentum to sustain the work once the foundation leaves.



### Lesson for Philanthropy

Catalytic investments likely need a longer window, like Packard Foundation's seven-year strategy. Although gains may be seen in a shorter time, true systems and policy changes take a lengthier commitment.

## Evaluation



### Lesson for Philanthropy

Evaluation results can be just as valuable for advocacy as they are for quality improvement.

During the first two years of its summer focus, the Packard Foundation hired Informing Change to conduct formative evaluations of the summer strategy as it was being developed and launched. The Foundation used these evaluations to update its after-school theory of change to apply more specifically to summer learning.

Beginning in 2011, the Foundation worked with Informing Change to evaluate the outcomes and impact of its after-school and summer investments. A midpoint evaluation was completed in 2014, and a final evaluation is slated for completion in 2017. These evaluations were especially important, because they supplied the Foundation and its partners with data it could use for continuous adjustment and improvement.

“The evaluation data we received from Informing Change gave the Foundation and our grantees and partners an ongoing, real-time sense of what was working well and where we needed to adjust our

course. It allowed everyone involved to make group decisions based on fact rather than assumption and helped us keep our shared goals at the forefront,” says Acevedo-Cross. “Without ongoing evaluation, we could easily have floundered or allowed our strategy to drift off course.”

“Seeing the evaluation reports from Informing Change crystallized many issues for us,” says ASAPconnect’s Arancibia. “For example, it showed us the need for more regional information hubs to distill and disseminate the content that local programs want. It also provides us with data we can use to advocate for quality programs.”

Throughout the duration of the after-school and summer investments, Informing Change served as both evaluator and thought partner, which provided multiple benefits. “We were able to raise issues, call questions, and raise awareness about potential challenges throughout the process,” says Chepick.



# Outcomes

After seven years of intense focus, California school districts, partner organizations, and state policymakers report a better understanding of the importance of summer enrichment experiences and an enhanced focus on quality in summer programs. More flexible funding exists for districts to operate summer programs. A network is in place that promises to continue to bring program providers, technical assistance providers, and advocates together to push the messages and work of quality summer learning forward. And, most important, across California more students are having quality summer learning experiences.

“Seven years ago, there was no real agreement about the use of quality standards,” says Acevedo-Cross. “Now, there is widespread agreement and people are starting to use state-adopted quality standards.”

Education policymakers have broadened their scope to a year-round focus that includes summer learning as a priority. In addition, the state has provided new opportunities to fund summer learning experiences with state dollars through Local Control and Accountability Plans (LCAPs) and with federal 21st Century block grants.

“Under Michael Funk’s leadership, the Expanded Learning Division of the California Department of Education has conducted unprecedented, very successful field engagement and input for its priorities and work,” says PCY’s president and CEO Jennifer Peck. “Michael and Tom Torlakson have been critical advocacy partners with PCY in advancing expanded learning.”

## Technical Assistance

Technical assistance providers have shared the message of summer learning and the importance of a whole-child/whole-year approach with thousands of people engaged in hundreds of after-school sites across the state and have helped them deploy quality summer programming.

According to findings by Informing Change, in 2016 eight technical assistance providers delivered more than 1,000 hours of assistance annually in 370 total sessions to more than 4,000 individuals throughout the state, ranging from superintendents to program managers to frontline teachers and staff. Of the 1,032 agencies receiving technical assistance, 172 were entering the summer space for the first time, and more than 400 sites had not received technical assistance for summer learning before. The technical assistance providers estimate that their services resulted in an impact for more than 1,150,000 students.

Teachers who participate as summer learning instructors and see the increased enthusiasm and performance among students are now applying many of the pedagogical techniques from summer to their regular school year classrooms.

“Teachers who took part in the summer learning experience are now telling us that it will change the way they teach,” says Gloria Halley, a technical assistance provider in rural Glenn County. “They were influenced by the experiential, hands-on nature of the program, and by being the

facilitator of learning rather than telling kids what to do. They said the students seemed eager to learn and had fewer behavioral issues. The bonds formed during the summer program carried on during the school year, and students see their teachers in a different light. Plus, teachers became advocates, recruiting other teachers to create more experiential learning for their students.”



### Voice from the Field

*“If the Packard Foundation had never gone into summer, the issue would be nowhere right now in California. Just by weighing in on an issue, a foundation can create interest and salience for it.”*

Arron Jiron, Senior Program Officer,  
S. D. Bechtel, Jr. Foundation



### Voice from the Field

*“Those of us in the parks and recreation field have long believed in the value of summer engagement, but Summer Matters provided a valuable rationale and evidence that what we believed was true. That gives us an impetus to speak more forcefully and loudly about that belief in public policy discourse.”*

Elizabeth Goldstein,  
former President,  
California State Parks Foundation

## Ongoing Partner Commitments

Statewide partners in the summer learning effort are committed to continuing their roles in some form, even though the Packard Foundation will no longer be funding.

“Our involvement in the Summer Matters campaign made it clear how connected and important the state parks system can be to helping children in terms of lifelong learning,” says Elizabeth Goldstein, former president of the California State Parks Foundation. “The idea that they can be deliberate about a broader education frame—that was a real eye-opener.”

“We were able to design our Lunch at the Library program as part of our summer learning work, and turn it into a statewide program at more than 100 sites,” says Cole, who also reports “a lot more intentionality around summer learning within the library community. That’s partly because of the Packard Foundation, and partly because of growth in attention to summer overall. Some libraries now see themselves as summer learning providers and are looking for ways to be more intentional about their activities in summer reading programs to help kids retain their skills.”

The California School Boards Association used its statewide platform to connect with and learn from superintendents who were operating quality summer learning programs and encourage them to share their experiences in other districts. The association is featuring summer learning topics at its annual conferences, and it has produced a number of tools for creating quality summer programs on its website. CSBA also is helping districts consider

summer learning in the context of new education policies, such as the federal Every Student Succeeds Act.

At the California Department of Education and its Expanded Learning Division, a strategic plan released in 2014 includes summer in its initiatives to provide support and communication to expanded learning programs. In addition, the Division has, for the first time, produced a set of quality standards for both after-school and summer programs.



### Lesson for Philanthropy

*Sustainability comes when foundations work to create local connections and capacity for the uptake of great ideas—whether or not other large funders will be part of the picture.*

## Local Champions

Across the state, new champions for summer learning have emerged as advocates, practitioners, and supporters. The most energetic and enthusiastic group among these champions is superintendents. For superintendents like William McCoy, formerly at Red Bluff Union Elementary School District, it is a natural extension of caring for children. “We can’t pack everything into the school year,” he says. “Kids are a part of our community throughout the year, and we need to grasp every

opportunity to spark their imaginations, build skills, and broaden horizons. There are many superintendents who are doing this work, and now we're bringing attention to their accomplishments and inspiring new champions for summer."

The vast majority of funding for summer enrichment experiences is provided from state funds, local school districts, and private partners. Local private funders have also begun to step up to support summer learning in their communities.

Localized support may prove to be critical, since other statewide and regional philanthropies have been slow to enter the summer learning space. Two funders did serve as allies: The S. D. Bechtel, Jr. Foundation leveraged the Summer Matters campaign to provide support for summer STEM programs and made concurrent investments

in the state technical assistance provider network. And the Wallace Foundation made investments in summer learning nationwide and served as a Packard Foundation thought partner in considering measures for quality. However, the Packard Foundation is exiting the summer learning space, Bechtel will sunset its operations in 2020, and Wallace's current multiyear initiative in summer learning is concluding. While some smaller private and community foundations have supported local or regional efforts, as of this writing no larger, statewide funder has indicated entry in the summer learning field. While this could be seen as a red flag for sustaining a statewide network, it could also signal a deep embrace of the importance of summer at a grassroots level. Hopefully, that will play out in local funding priorities as well as in growing state and regional networks over the long term.



#### Voice from the Field

*"I do think the way the Packard Foundation designed and led their summer learning commitment was exemplary. It helped us make the case to our board to enter the space. I hope other foundations will continue the research, field building, articulating of best practices, and public/private partnerships on the local level."*

Dara Rose, Senior Program Officer,  
The Wallace Foundation

## Summer Learning Accomplishments at a Glance

### **Quality: Established a definition of "quality" that was adopted by the state as the standard of practice**

- 63% of expanded learning program providers implementing the state's quality standards
- 100% of summer learning program providers supporting some type of quality indicators for summer learning programs

### **Technical assistance: Strengthened technical assistance support.\***

- 4 Summer Matters regional hubs
- 8 TA organizations
- 868 programs throughout California supported with TA strategies
- TA services for 4,029 individuals representing 1,032 districts or agencies

### **Advocacy: Increased the number of champions for summer learning**

- 73 superintendent champions
- 36 organizations building a Summer Learning network, 11 of these new to the Summer Matters campaign
- Elevated discussion of the importance of summer learning among state policymakers (see "Quality" above)

\*Numbers represent 2016



# The Foundation Says Good-bye to Summer

Saying good-bye at the end of seven years was not easy, and the Packard Foundation made a concerted effort to prepare and support grantees and partners as it transitioned out of the summer learning space. Knowing from the outset that its investment would be time-limited, the Foundation carefully crafted a six-point strategy for ensuring a graceful exit that would not undermine the impact of its investment or the work of its partners.

1. The Foundation prepared for its exit from the beginning, factoring in the need for (and cost of) capacity building to help partners ease into the transition.
2. Knowing that grantees would need to continue their summer learning work together—not separately—the Foundation fostered capacity by helping grantees make and strengthen connections and explore the creation of an ongoing network structure and strategy. It also provided individual “transition grants” during the two years leading up to the transition to help grantees enhance specific capacities such as fund development or communication expertise.
3. From the outset, the Foundation was clear about its intended time frame and supplied all grantees and partners with common language to use about their work even after the Foundation had exited the space. This made for no surprises and helped to cement ongoing relationships within the field.
4. In 2017, the Packard Foundation is conducting a Capstone Learning Tour to share with other funders what the summer learning initiative accomplished and what the Foundation learned in the process.
5. As it exited, the Foundation provided research to partners and others on the

state of the field to help guide future planning and work.

6. At the end of 2016, the Packard Foundation celebrated the collective achievement and honored all grantees and partners by hosting a special gathering. This provided a sense of closure for the Foundation’s financial support but also helped mark the beginning of the next phase for all of the organizations that will continue the vital work of quality summer learning moving forward.

The capacity building support was particularly valuable to grantees, and the Foundation tried to structure that support in ways that were most useful and effective for different organizations.

“There is no one-size-fits all for capacity building,” says Acevedo-Cross. “You have to pay attention and strike a balance between the different organizations you’re trying to support. We used a ‘sandwich method’: starting with group sessions, then one-on-one coaching or support for specific challenges, and then a closure gathering in which participants could share with one another. That helped us to be tailored yet support a big cohort of grantees at the same time.”

In rural Glenn County, the challenge of sustainability is different than in urban school districts. “We’re the only rural program, so we don’t have the same resources that other programs have to pull from,” says Philip James of the Spark Afterschool Program. “When the Packard Foundation was doing training specifically for sustainability, a lot of it didn’t relate to us. We have to rely on our school district rather than our community to address sustainability. But even without the Foundation’s financial support and technical assistance, we’re set



## Decision Point

In addition to being clear from the outset about its time-limited investment, the Packard Foundation also chose to help ease the transition for grantees and partners by providing additional capacity-building support and technical assistance during the three years leading up to its funding exit.

## Six Strategies for a Graceful Exit

1. Prepare from the beginning
2. Foster grantee connections and capacity
3. Be transparent about time frame and create common language around your exit
4. Share learnings
5. Support research to guide future work
6. End on a high note



### Voice from the Field

*“The Packard Foundation had a separate organizational effectiveness fund for grantees that was a great resource for the summer learning field. That’s a core best practice, because grantees aren’t competing with themselves between program support and capacity building.”*

Rebecca Goldberg, Program Officer,  
S. D. Bechtel, Jr. Foundation

to continue our programming, and all the key components that make it successful will remain intact.”

“The Packard Foundation’s departure is a particularly unusual moment for PCY, because they were our very first funder back in the late 1990s and have been with us since day one,” says Peck. “But they could not have been more responsible and supportive in their transition. Our grants have been generous and flexible, and they’ve provided capacity support on top of that to help sustain what we’ve built.”

Compared to funders in other states, the Packard Foundation’s length of investment was a rare treat, according to NSLA’s former CEO Sarah Pitcock. “Seven years is a long time. We rarely have that time horizon, and it takes that long to move the needle on quality.”

For many of the statewide partner organizations—like the California School Boards Association and the California State Parks Foundation—embedding summer

learning into the ethos and existing work was a key goal for the Packard Foundation. Although the amount of Foundation funding was relatively minimal compared to overall budgets, now that these organizations have embraced summer learning, those funds can be replaced or enhanced from other sources.



### Lesson for Philanthropy

Departing a space does not mean pulling the rug from under those who remain. Capacity building support to help grantees ramp up skills to ensure the sustainability of their work makes for a graceful exit and produces a win-win for foundation and grantees alike.



## Transitioning from Campaign to Broader Network

In terms of next steps for those organizations that remain in the summer learning field, the work will continue in two ways.

First, the Summer Matters campaign will continue under the coordinating guidance of PCY. The campaign has committed to help expand the number of new summer programs and intentionally approach organizations that might offer them. PCY also will continue to oversee all messaging and communications work related to summer advocacy and promotion—such as connecting local programs to media opportunities and creating talking points—to ensure continuity and consistency.

Second, the Packard Foundation has helped members of the Steering Committee explore new ways to continue their work together—namely in the form of a network with less top-down control but more flexibility for network members to take action.

The Steering Committee began to learn about and practice using a network model in 2015. That network exploration brought in a lot of new energy and players, many of whom had not been funded by the Foundation. It also showed the potential of new partners. For example, the Leadership Learning Community, a technical assistance provider that specializes in creating networks, offered seed funding for network members who wanted to learn or work together to benefit summer learning experiences for youth. In 2016, five projects received seed funds:

- A student-run farmers market that highlights student learning about nutrition, gardening, and physical activity (Boys and Girls Club of South Lake Tahoe and UC Cooperative Extension)
- A special professional development convening on summer learning (California School-Aged Care Consortium and ASAPconnect)
- A series of youth development workshops for organizations that provide summer learning programs (Riverside 4-H Youth Development Program, Sigma Beta Xi, Inc., and Community Now)
- The creation of a Summer Learning Coalition within a school district to assess current offerings and develop a strategic plan for increased coordination and impact (Visalia Unified School District and National Summer Learning Association)
- A map of existing expanded learning activities in one of California's largest counties (West Contra Costa Public Education Fund, City of Richmond, West Contra Costa Unified School District, East Bay Center for the Performing Arts, Richmond Art Center)

"The network is still in a beta format, testing what things should happen through the network versus what should be more tightly coordinated and handled by the Summer Matters campaign, but we're excited by what we've seen them do so far," says Acevedo-Cross. "It's inspiring to see how they're moving forward even as we've stepped back."



### Lesson for Philanthropy

Structures may need to change when a funder departs, such as the shift from steering committee to information network for the partners in the Packard Foundation's summer learning work. Funders can support that change in structure by helping grantees explore alternative models.

# Applying Summer Learning to the Road Ahead

Although the Packard Foundation's funding of summer learning expansion in California has ended, the work of building awareness, promoting quality, and advocating for supportive public policy continues. PCY continues to manage the Summer Matters website, and to gather and create tools and documents with a long shelf life that can be shared with field. It also is folding summer into its overall policy and awareness-raising activities about expanded learning programs. Technical assistance providers continue to spread the gospel of quality summer enrichment statewide. And a growing number of school district leaders (58 in 2016 as opposed to 50 in 2015) are building summer learning experiences into their budgeting and accountability plans, according to analysis from PCY. In addition, 63% of summer learning program providers report that their state and federal funding has remained stable or increased since 2013.

As for the Packard Foundation, it is getting more laser focused on very young children, looking holistically at health and education. For this work, the Foundation will apply several of the experiences and lessons from its summer learning investments.

"We will take a combination of advocacy, practice, and communications from our summer work, as well as the use of data and continuous improvement that were part of our ongoing evaluations," says Mani. "In our summer learning experience, our technical assistance providers were able to see, on an annual basis, what their reach and level of quality of services were and think about what they would do differently next year. We want to see that in all of the work that we do."

The Foundation also wants to see a focus on quality, says Acevedo-Cross. "In past initiatives we've used a rapid expansion approach, but doing so means that quality can suffer. We learned from our summer learning work that if you insist on high quality from the start, that level of quality is likely to be a part of any expansion and you'll ultimately end up with deeper, more sustained change throughout the field."

"We will bring a lot with us about what it means to do place-based work," adds Sunshine. "And we'll also move forward with eyes wide open to look for strategic, time-limited interventions that can add value to the field and to the Foundation."

As a part of those interventions, the Foundation will leverage assets beyond just the financial ones. One of the most valuable components of the summer learning work proved to be the thought partners engaged around the table—first in the practice consortium, then in the work of the Summer Matters campaign.

"The engagement of multiple partners not only allowed the best thinking to emerge but also instilled a sense of ongoing ownership into the broad network. That's what ultimately changes a landscape in terms of practice and policy," says Acevedo-Cross.

Partners also take away new knowledge to apply to other aspects of their work.

"This initiative really showed us how to run a campaign," says Arancibia. "As I'm in other groups, I'm lifting up how we structured the Summer Matters campaign and urging replication for other initiatives."

"The strategies developed and executed for the Summer Matters campaign—the

interwoven focus on communications, policy/advocacy/champion building, and building local models to learn from and highlight—have informed almost everything we do as an organization," says Peck. "This work built and honed our skills in developing messages, products, and activities that speak to key audiences. It also informed our local training and technical assistance work and solidified our commitment to the cycle of quality improvement and the importance of the year-round nature of that work."

Acevedo-Cross also acknowledges the value of using the lessons and successes of the Packard Foundation's summer learning initiative to build momentum for the future. "We're now more knowledgeable about strategies that can work in other areas," she says. "As we move into new projects, we'll always be looking for ways to leverage our existing work and carry lessons forward to create change for children and youth."

## Practices the Packard Foundation Will Take Forward

- The combination strategy of local practice and broad advocacy
- The use of ongoing evaluation for continuous improvement
- A focus on quality
- A deeper understanding of place-based work
- An eye toward strategic, time-limited opportunities
- A network of thought partners

## After School and Summer Enrichment Grantees

A World Fit for Kids  
Alameda County Community Food Bank  
Bay Area Video Coalition  
BTW Consultants, Inc.  
Butte County Office of Education  
California Food Policy Advocates  
California Library Association  
California School Age Consortium  
California School Boards Research Foundation  
California State Parks Foundation  
Californians Dedicated to Education Foundation  
Center for Collaborative Solutions  
Central Valley Children's Partnership, Inc.  
Children's Initiative  
City and County of San Francisco  
Council for a Strong America Fight Crime: Invest in Kids  
East Bay Asian Youth Center  
Food Research & Action Center  
Foundation for California Community Colleges  
FowlerHoffman LLC  
Fresno County Office of Education  
Friends of LACOE  
Gilroy Unified School District  
Glenn County Office of Education  
Grantmakers for Education  
GreatSchools  
How Kids Learn Foundation  
Institute for Educational Leadership  
Institute for Local Government  
Johns Hopkins University  
LA's BEST  
Los Angeles County Education Foundation  
Monterey County Office of Education  
National Academy of Sciences  
National Summer Learning Association, Inc.  
Oakland Unified School District  
Partnership for Children and Youth  
PR and Company, LLC  
Public Agenda Foundation, Inc.  
Public Health Institute  
Public Profit, LLC  
Putnam Consulting Group, Inc.  
Regents of the University of California - Davis  
Regents of the University of California - Irvine  
Sacramento City Unified School District  
Sacramento County Office of Education  
San Bernardino City Unified School District  
San Francisco School Alliance Foundation  
San Francisco State University  
San Francisco Unified School District  
Santa Clara County Office of Education  
South Bay Center for Counseling & Human  
Development  
Stanford University  
The Forum for Youth Investment  
THINK Together  
United Way Fresno and Madera Counties  
Whittier City School District  
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