



# EMBEDDED TECHNICAL ASSISTANCE

Facilitating Systems Change  
in a Place-Based Initiative

BY DIANA GARCIA

the David &  
Lucile Packard  
FOUNDATION

# INTRODUCTION



In 2014, the Children, Families, and Communities Early Learning team at the David and Lucile Packard Foundation launched **Starting Smart and Strong**, a 10-year place-based initiative to explore concrete ways communities can ensure that every young child, birth through age 5, grows up healthy and ready for kindergarten. The team set out to work with three communities – Oakland, Fresno, and the Franklin-McKinley School District (FMSD) in San Jose, California – to improve the quality of early learning and developmental experiences in both formal and informal settings by bringing together public and private partners to create comprehensive early-learning systems and ultimately scale what works.

Starting Smart and Strong focuses on four pillars of work: 1) testing and scaling approaches to professional development and training for caregivers and educators; 2) resources and support for parents, families, friends, neighbors, and other informal caregivers; 3) access to quality health care and developmental screenings for all children in the community; and 4) creating strong and durable early-learning systems and a plan to scale what works (Packard Foundation, 2017). In addition, each community is offered additional support from grantee partners, including evaluation, communications, innovation and scaling, and technical assistance support.

## PURPOSE

The purpose of this case study is to tell the story of why the Foundation’s Early Learning Team decided to embed technical assistance (TA) in each of the three Starting Smart and Strong communities and share insights learned from implementing embedded TA as the initiative approaches year 7 of 10. Funders, intermediaries, community partners approaching systems change work at the local level, and others can all use these learnings to inform their approach to working with communities.

This case study hopes to go deep into capturing insights on one of many key levers in the Starting Smart and Strong initiative. This narrative documents the reasoning behind embedding technical assistance in the Starting Smart and Strong initiative, the selection process, and the role each technical assistance provider played in each community, and highlights five lessons the Foundation’s Early Learning Team has learned from providing embedded technical support in a place-based initiative: 1) Match Matters; 2) Community Choice; 3) Responsive Partners; 4) Articulating the Role; and 5) Build Relationships.

## METHODOLOGY

Preparation for this case study included consultation with the Foundation's Early Learning Team, a review of briefs written by the initiative's evaluation partner (Engage R+D), and interviews with the Foundation's Early Learning team, three TA providers, and five community leaders.

## BACKGROUND: EMBEDDED TECHNICAL ASSISTANCE

It is not unusual for foundations to offer grantee partners specialized expertise through technical assistance to support capacity-building efforts. Technical assistance is a type of capacity building used by organizations to obtain the necessary knowledge, tools, and other resources to develop, implement, and assess targeted improvement with the support of a consultant or expert (GEO, 2016). For decades, TA has been used as a tool to deepen and expand impact of work led in communities. However, the method through which it is delivered can vary greatly in approach, cost, complexity, and oversight.

When the Foundation approved the Starting Smart and Strong initiative, program officers Bernadette Sangalang and Jeff Sunshine were compelled to think differently about the best roles they could play to support grantee communities and amplify the voices of teachers, caregivers, and parents. With the understanding that place-based initiatives are complex and require continuous community presence to build trusted relationships, Sangalang and Sunshine realized that it would be physically impossible for them to be in three geographic areas at once, especially during the first few years of strategy implementation when many pieces of the work would be moving rapidly. While the Foundation's Early Learning team knew they could not be present for the day-to-day activities of the communities, they also knew that they needed to engage and connect with each of the community grantees and their partners to learn, build collaborative relationships, and identify ways to best support the communities in advancing the goals to support early learners in their community (Sunshine & Sangalang, 2018).

Prior to launching the strategy, Sangalang and Sunshine examined existing models to support community partners with TA. Alternatives included working with





an intermediary or a university partner, but none of the models they explored seemed to fit with the individualized and flexible support that they imagined the communities would need to create comprehensive early learning systems for young children and their families. These alternatives fell short as they seemed to offer support that was either too loosely structured or too overly structured.

With a limited budget and time, the Foundation's Early Learning team wanted to maximize the flow of support into the three communities and provide them with immediate access to experts who could help them make long-term changes to the systems and structures that support young children and their families. The idea was that each community grantee would have access to a technical assistance provider with expertise tailored to the needs of their community. The technical assistance provider would be someone who could be readily available and hold the long-term vision of the 10 year initiative. As such, the Foundation's Early Learning team cultivated the idea of embedding a TA provider in each of the three Starting Smart and Strong communities.

## **DEFINING THE ROLE OF A TECHNICAL ASSISTANCE PROVIDER**

The Foundation's Early Learning team launched Starting Smart and Strong as an emergent strategy that would continuously adapt to meet the needs of communities so that they could test and scale solutions to support parents, caregivers, and educators as they prepare children to be healthy and ready for school. Because the needs and context of each community were so different, each community was invited to chart their own path that would help them create a comprehensive system of care that serves children and families. To approach this complex work, the Foundation's Early Learning team envisioned that each TA provider would bring to each community an understanding of adult-child best practices, experience with systems change, deep community knowledge, and experience with cross-sector partnerships. There was no clear scope of responsibilities for the position when TA providers were invited to take on this role, but Sangalang and Sunshine hoped that the TA providers would work with each community to co-design the role as the work unfolded. However, because the TA provider role was not clearly defined, it was also important for the TA providers themselves to have strong relationship-building skills.

## INITIAL ASSUMPTIONS ABOUT TA

Before identifying consultants for the TA role, the Foundation's Early Learning team had some initial assumptions about how embedding TA providers in a place-based initiative would play out:

1. Because each community's context and priority areas were so unique, it would be important for each community to have their own TA provider who could focus on their needs and build understanding of the environment they work in.
2. TA providers would have to be a readily available resource to each community, bypassing the need to wait for the Foundation's Early Learning team's response.
3. As TA providers developed relationships with community members and worked collaboratively across each community, they would become trusted members of the leadership team in each community and over time build an understanding of ways to support them.
4. Each provider could be a communication bridge between the Foundation's Early Learning team and the communities, and vice versa.
5. Embedding TA providers in communities would be more cost-effective than the alternative models, allowing more money to flow into the communities.
6. Having a TA provider in each community would allow communities and the Foundation's Early Learning Team to learn from each other about systems change.



## SELECTING EMBEDDED TA PROVIDERS



**A**t the launch of the strategy, the Foundation's Early Learning team identified potential candidates who could serve as partners to catalyze the conditions to create and scale impact for young children and their families based on their experience working with each community. Once TA providers were identified by the Foundation's Early Learning team, they were introduced to the communities.

### **FRANKLIN-MCKINLEY SCHOOL DISTRICT**

In Franklin-McKinley School District (FMSD), a small district in East San Jose, it was important to choose a TA provider who could help make change at the school district level, build early learning capacity amongst leaders in the district, and connect those leaders to other early childhood efforts in the community, such as those occurring at Educare California at Silicon Valley (Educare), a model early learning school with professional development and research institute that was built in FMSD. With these considerations in mind, the Foundation's Early Learning team selected Lisa Kaufman, PhD – who served as director of the Early Learning Services Department for the Santa Clara

County Office of Education and later as Executive Director of Educare – as the TA provider to support FMSD in improving the day-to-day practices of adults who work with children birth to age five. As an early childhood leader in the community, Kaufman was a key player in developing and holding a strong vision for early childhood in Santa Clara County, and she had been deeply involved in helping to set the goals and the approach for Starting Smart and Strong in Franklin-McKinley School District.

When Kaufman subsequently transitioned out of her position as Educare's Executive Director and her role as a TA provider, it was difficult to find a replacement with the skills and knowledge to replace her. The Foundation's Early Learning team initially asked community leaders what type of support they needed, but the leaders were uncertain precisely what types of support a TA provider could provide. However, when the Early Learning team re-framed the question and asked their partners at FMSD, "What is something you need to move the work forward?", they obtained a clear answer – Melinda Waller, Director of Early Learning in the district at that time, replied that the district needed additional support in building deep knowledge of

teaching practices to support the development of its youngest students. Armed with this knowledge, the Early Learning team hired Chris Sciarrino – who was supporting the three communities in Starting Smart and Strong through her role at the **Early Learning Lab**, co-creating and implementing professional development for teachers – to step in and provide FMSD’s Starting Smart and Strong leadership team with tailored support for applying innovative early childhood practices at the district level.

## **FRESNO**

In Fresno, one of the largest cities in the Central Valley, leaders from various agencies were developing a growing consensus around the importance of the early years and the impact that enriching services to that age group could have on their community. There was shared awareness that they needed to increase their capacity to expand services and improve the quality of those services. To support these goals, the Foundation’s Early Learning team selected Whitcomb Hayslip, former Assistant Superintendent of Early Childhood Education for Los Angeles Unified School District (LAUSD) as a partner to help improve the quality of services for

young children across Fresno Unified School District (FUSD) and its community partners. After retiring from his work at LAUSD, Hayslip had supported FUSD with technical assistance as they expanded Transitional Kindergarten and was a familiar partner. Although Hayslip did not live in Fresno, his long history of work in early learning, experience working with large school systems and their community partners, and work consulting with FUSD made him a known and credible partner to both FUSD and the Foundation’s Early Learning team.

## **OAKLAND**

In Oakland, leaders at the Oakland Unified School District (OUSD) decided early on to implement a collective impact approach to develop a citywide, integrated, quality early childhood system to address racial and ethnic disparities. They envisioned forming a collaborative table with community groups, early childhood educators, city and school district officials, and other interested parties throughout the city. Their overarching long-term vision sought to creating universal access to high quality experiences that promote healthy child development and result in



kindergarten-ready children. To realize this vision, the initiative needed someone with an understanding of the complex early learning ecosystem in Oakland.

When the Foundation’s Early Learning team began conversations about potential candidates, Curtiss Sarikey, now Chief of Staff at OUSD, identified Andrea Youngdahl as a candidate for the embedded TA provider role for Oakland Starting Smart and Strong (OSSS). Youngdahl brought deep relationships and

understanding of both public sector and community organizations that helped foster trust and build relationships at the Oakland cross-sector table. She previously served as Director of the Alameda County Interagency Children’s Policy Council and Director for the City of Oakland’s Department of Human Services for 12 years. Youngdahl carries credibility in systems change, early childhood, family and community services, and social justice work.



## THE ROLE OF EMBEDDED TA

In the three Starting Smart and Strong communities, the TA provider has played a unique role in supporting each team to advance the goals they had set out to achieve. Each TA provider has built an understanding of their community’s ecosystem and key stakeholders to drive the conditions for creating sustainable change, and each has demonstrated a deep commitment to the community’s goals.

The TA providers support their respective communities in creating systems change through different approaches, but all play essential roles as experts in early childhood education, cross-sector collaboration, and systems change to:

- Support leaders in the community;
- Connect communities to resources and build cross-sector relationships;
- Uphold the vision of Starting Smart and Strong; and
- Act as intermediaries between communities and the Foundation.

The following sections describe the role embedded TA has played in Franklin-McKinley, Fresno, and Oakland.

## LEADERSHIP SUPPORT

As TA providers, Sciarrino, Hayslip, and Youngdahl each brought a wealth of experience in cross-sector partnership development, early childhood education, and systems change. Such expertise has been instrumental in bringing resources into each community, supporting district leaders in building an

understanding of early childhood, and establishing relationships that advance the goals of Starting Smart and Strong. As trusted advisors, the TA providers have supported leaders in each community as they have navigated implementation and developed partnerships to create comprehensive early learning systems in their communities.

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### Franklin-McKinley School District

In FMSD, Sciarrino has played an influential role supporting Melinda Waller and, subsequently, Jennifer Klassen in their roles as successive Directors of Early Learning. When Waller was first hired as the sole employee of her district department, she was isolated – the next thought partner in line was the district Superintendent. The hiring of Sciarrino as a TP advisor provided Waller with a regular collaborator for brainstorming, processing ideas, and making plans for implementation. When Klassen replaced Waller in the newly expanded role of Director of Early and Elementary Education, she and Sciarrino took the time to learn one another’s working styles and build a relationship that could advance the work of the initiative as it reached its mid-point. For Klassen – who now leads the district’s early childhood efforts – Sciarrino has played a supportive role. Klassen describes Sciarrino as “the glue that holds it together and the partner that helps bring a lens of alignment, collaboration, and historical knowledge to everything we do.” While adjusting to her new role as Director of Early Learning, Klassen used Sciarrino as a sounding board for thinking about the scalability and sustainability of efforts.

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### Fresno

During the first years of the initiative at Fresno, Hayslip worked closely with district staff to build leadership capacity in early childhood and to understand the larger ecosystems that impact the well-being of young children and their families. He also worked with Deanna Mathies, Executive Officer of Early Learning Department, to envision quality early childhood programs for the community. As an established leader in the K-12 system, Mathies needed additional support as a new leader in the early childhood space. Now that Mathies has grown into her role as a credible and influential leader in the field of early learning, Hayslip has shifted his efforts to mentoring Maria Ceballos, who has transitioned from Program Manager to Director of Early Learning at FUSD.

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### Oakland

In the early stages of OSSS, Youngdahl helped build a collaborative table and supported further development of OUSD’s Early Childhood Education Department. In particular, she worked closely with the newly hired Director of Early Childhood Education, Ray Mondragon. This Superintendent’s Cabinet-level position represented an elevation of early childhood education within the district, initially funded by philanthropy. Youngdahl assisted Mondragon with his transition into the role and with building relationships with key partners. She also helped frame state and local policy and practices for Mondragon, who was new to Oakland and to California. After the first two years of the initiative, Youngdahl has transitioned to mentoring and supporting Priya Jagannathan, who took on the role of Manager and then of Director of Oakland Starting Smart and Strong. As Jagannathan has taken leadership over the collaborative table, Youngdahl has provided thought partnership to OSSS for facilitating city and county conversations, has continued to bring new partners to the table, and has helped on-board new staff by bringing them up to speed on early childhood content and local community context.

## RESOURCE CONNECTOR AND RELATIONSHIP BUILDER

The TA providers are also important resource connectors and relationship-builders for each community. For Franklin-McKinley, it was important to have someone with early childhood expertise who could support the

*“[Sciarrino is] brilliant with data, the educators, and bringing in the teacher lens.”*

–Jennifer Klassen, FMSD

district. After Kaufman left the TA provider role, the district needed someone with a deep knowledge of early childhood pedagogy. Sciarrino brought more than 40 years of early childhood field experience,

understanding, and passion for working with teachers. She has supported the Franklin-McKinley initiative with her in-depth knowledge of early childhood platforms and comprehensive early learning system development. Drawing on her many years of field experience in co-creating and implementing professional development trainings for teachers, Sciarrino was able to connect district leaders to high quality researchers to inform their testing and learning around social-emotional development. The Director of Early and Elementary Education at Franklin-McKinley, Jennifer Klassen, describes Sciarrino as “brilliant with data, the educators, and bringing in the teacher lens.” Sciarrino’s creativity, innovation, and understanding of data and teacher perspectives have helped the district develop evidence-based practices and build capacity for using data to inform classroom practices in a way that works for the community.

In Fresno, Hayslip engages community partners in conversation to learn about needs in the community and then connects these partners to additional resources like content experts and funders. His experience in the early childhood field and as a leader in a large district has been useful for connecting key players in the community to ensure that adults have the necessary skills to support young children. For example, when the Fresno Starting Smart and Strong team identified dual-language learning as an area of focus for the community, Hayslip was able to bring in prominent content experts to support the team. According to community leaders, this was an area of work where they needed help and did not have the expertise to carry out their plans themselves. Hayslip knows how to work with communities, bring people together, and connect issues

in the community with intentionality to support the youngest learners. In the community, he spends time getting to know early childhood professionals, listening to their concerns and identifying their strengths.

In Oakland, Youngdahl’s breadth of knowledge and experience in systems change has been instrumental in building a collaborative table for early childhood education in the City of Oakland. As a trusted and well-known systems leader in the community, Youngdahl has played a pivotal role in building relationships, convening, and setting priorities for the initiative during its initial phases of development. She supported the initial framing of OSSS’s testing and learning work around trauma-informed practices and connected the collaborative table to content experts. Youngdahl continues to provide strategic planning technical assistance to the collaborative table, guiding alignment conversations and strategic relationships.

## VISION HOLDER

In all three Starting Smart and Strong communities, community partners describe their TA providers as the force that keeps everything together. Each TA provider supports their community in the day-to-day work while also supporting the community’s long-term vision for a comprehensive early childhood system. The TA providers also help lay out a roadmap that aligns with the strategy’s North Star – ensuring that every young child in the three communities grows up healthy and ready for kindergarten – by connecting to broader conversations around policy, informal care, and healthy development at both the state and national levels. As the work of the communities has developed and community members have grown into leadership roles, the TA providers have stepped away from the daily implementation work to take on a broader role focused on sustaining the impact and progress that has been made by their communities. To describe how Youngdahl’s role has changed in OSSS, Priya

*“The day-to-day responsibilities are on my plate, and it is helpful to have someone who is looking out for the big picture and making connections with the other Starting Smart and Strong communities as well as what is happening at the state and national level.”*

– Priya Jagannathan, OSSS



Jagannathan said, “The day-to-day responsibilities are on my plate, and it is helpful to have someone who is looking out for the big picture and making connections with the other Starting Smart and Strong communities as well as what is happening at the state and national level.” TA provider support has also helped communities to secure additional funding from local funders to sustainably scale their work.

### **INTERMEDIARY & ADVOCATE**

As trusted members of their respective communities and the Foundation’s Early Learning team, TA providers play an important role as intermediaries. In each community, the TA provider is an active partner who engages with teachers, community partners, and district staff to build understanding of what is working well and where additional support is needed. These personal

relationships allow TA providers to champion the work led by communities and voice the need for additional types of support and resources to the Foundation. The TA providers’ ability to navigate conflicts has allowed them to push back on initial Foundation timelines and advocate for approaches based on community needs.

As liaisons, TA providers formally connect with the Foundation’s Early Learning team every two weeks to strategize around organizational and systems supports for each community. When more immediate thought partnership is needed, TA providers also individually contact the program officers – as they did almost daily at the beginning of the strategy. Through these conversations, the Foundation’s Early Learning team has learned about community context and shared ideas with TA providers for how to adapt and be responsive.

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### **Franklin-McKinley School District**

In FMSD, Sciarrino has been a critical player in facilitating discussions with the Foundation on restructuring the coaching model for teachers. She was able to articulate the needs of the district, help identify roadblocks and opportunities in the work, and champion the needs of the district.

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### **Oakland**

In Oakland, Youngdahl played an essential role in delaying the testing of innovative practices to spend more time supporting the district in building a foundational base for early childhood education.

## FIVE KEY LESSONS LEARNED

**E**mbedded TA has been an integral component of the Starting Smart and Strong initiative. Each TA provider has brought a unique set of skills and expertise to support each community partner in developing comprehensive systems for its youngest learners. As the Foundation's Early Learning team, the TA providers, and the community partners reflected on the role that TA providers have played in the Starting and Smart and Strong initiative, there were five key lessons highlighted:

1. Match matters. This means that it is important that the skills, qualities, and experience of the TA provider match the needs of each community partner, and especially of those individuals who will be leading the daily work of the initiative.
2. Communities should be closely involved in the process of identifying their TA partner.
3. Funders need to be responsive and nimble partners to TA providers and readily support them as they meet their communities' needs and ever shifting contexts.
4. Be explicit from the start about the responsibilities of the TA role, even as the role will develop over time.
5. Funders need to build their own relationships with community partners in addition to working with TA providers.

### LEARNING 1: MATCH MATTERS

*"I have worked with consultants before, but this is different. Usually, they come and give you advice, and then they leave. But he [Hayslip] gets his hands dirty in the work. He learns alongside us and is an active participant."*

—Maria Ceballos, FUSD

Starting Smart and Strong community partners shared the importance of having a TA provider that could help build their capacity in areas including early childhood education, systems change, and community building. Each community set out to advance early learning opportunities for children and their families using different approaches and

therefore needed tailored expertise to help advance their goals. As the work in communities has developed, leaders

in the communities have grown into their own leadership roles and new leaders have emerged, necessitating a shift in focus for the TA providers, who have had to adapt to identify areas of work where they can provide hands-on support to advance the broader vision.

From the very beginning of the initiative, each TA provider has been deeply engaged in the work with communities, including attending meetings, planning, leading professional development trainings, speaking with teachers, connecting with potential partners, sharing learnings, and helping write grant proposals and reports. One community partner described the TA role as someone more than a consultant, going above and beyond giving advice. Maria Ceballos, Director of Early Learning at Fresno Unified School District, said, "I have worked with consultants before, but this is different. Usually, they come and give you advice, and then they leave. But he [Hayslip] gets his hands dirty in the work. He learns alongside us and is an active participant."

### LEARNING 2: COMMUNITY CHOICE

Community partners also added that it is critical to include community leaders in the process of selecting a TA provider. Doing so helps to build trust, since TA providers support the long-term vision of the strategy and work closely with local leaders of the initiative. Funders who consider supporting partners with technical assistance should work closely with each grantee to identify specific needs and qualities the grantees seek to help advance their areas of work. For the three Starting Smart and Strong communities, it has been invaluable to have someone who knows the community well, is respectful of multiple perspectives, has the skills to navigate through conflict, holds expertise in early childhood education or complex systems change, and can build relationships with foundations and communities. As the work in each community unfolds, the type of expertise each community needs may change. In the Starting Smart and Strong initiative, the three TA providers have been able to adapt to meet the needs of the communities; however, that may not always be the case, and communities may need to seek out different forms of technical assistance. Given the central role that communities play in determining the success of such an initiative, the Foundation's Early Learning team

has learned that including community partners in the strategy design and in the TA provider selection process is critical for nurturing trusting relationships that facilitate systems change.

### **LEARNING 3: RESPONSIVE PARTNERS**

TA providers shared that the Foundation’s Early Learning team has played a critical role in their ability to support communities through system change. The team has been responsive to requests that TA providers have shared to better support communities in creating the conditions for change. A Starting Smart and Strong community partner shared that they are grateful that the Foundation does not set parameters on how the TA provider can support their community, which has allowed these providers the freedom to think outside the box without having to worry whether it falls within their scope of work. Constantly changing environments and stressors on communities make systems work challenging, but TA providers and the Foundation have built authentic relationships where together they can respond to rising concerns.

### **LEARNING 4: ARTICULATING THE ROLE**

The TA providers have played an important, supportive role for communities and the Foundation’s Early Learning team. However, defining and articulating the role of the TA provider in an emergent strategy – especially during the first few years of implementation – can be challenging and confusing. The evolving nature of the work made it difficult to anticipate how the role would develop over a 10-year strategy. To provide some clarity, the Foundation’s Early Learning team and the TA providers discussed the role and negotiated what it would entail. It has been important for the Foundation’s Early Learning team and TA providers to clarify to community leaders that the TA provider does not report back to the Early Learning team on the community’s progress; rather, TA providers are meant to be a readily available resource for community members to advance the goals of Starting Smart and Strong.





### ***LEARNING 5: BUILD RELATIONSHIPS***

TA providers have been able to build trusting relationships with their respective communities by working closely with them to help advance their goals. While the Foundation’s Early Learning team maintains regular communication with TA providers and with the three communities, working with an embedded TA provider does not give funders an excuse to step back from the work. As in any other relationship, building

trust is an active practice that takes time. To address the inherent power imbalances between philanthropy and communities, the Foundation’s Early Learning team has continued to build and nurture their own relationships with each community by listening, spending time in the communities, adapting to better support their community partners, and holding deep respect for the context of each community.

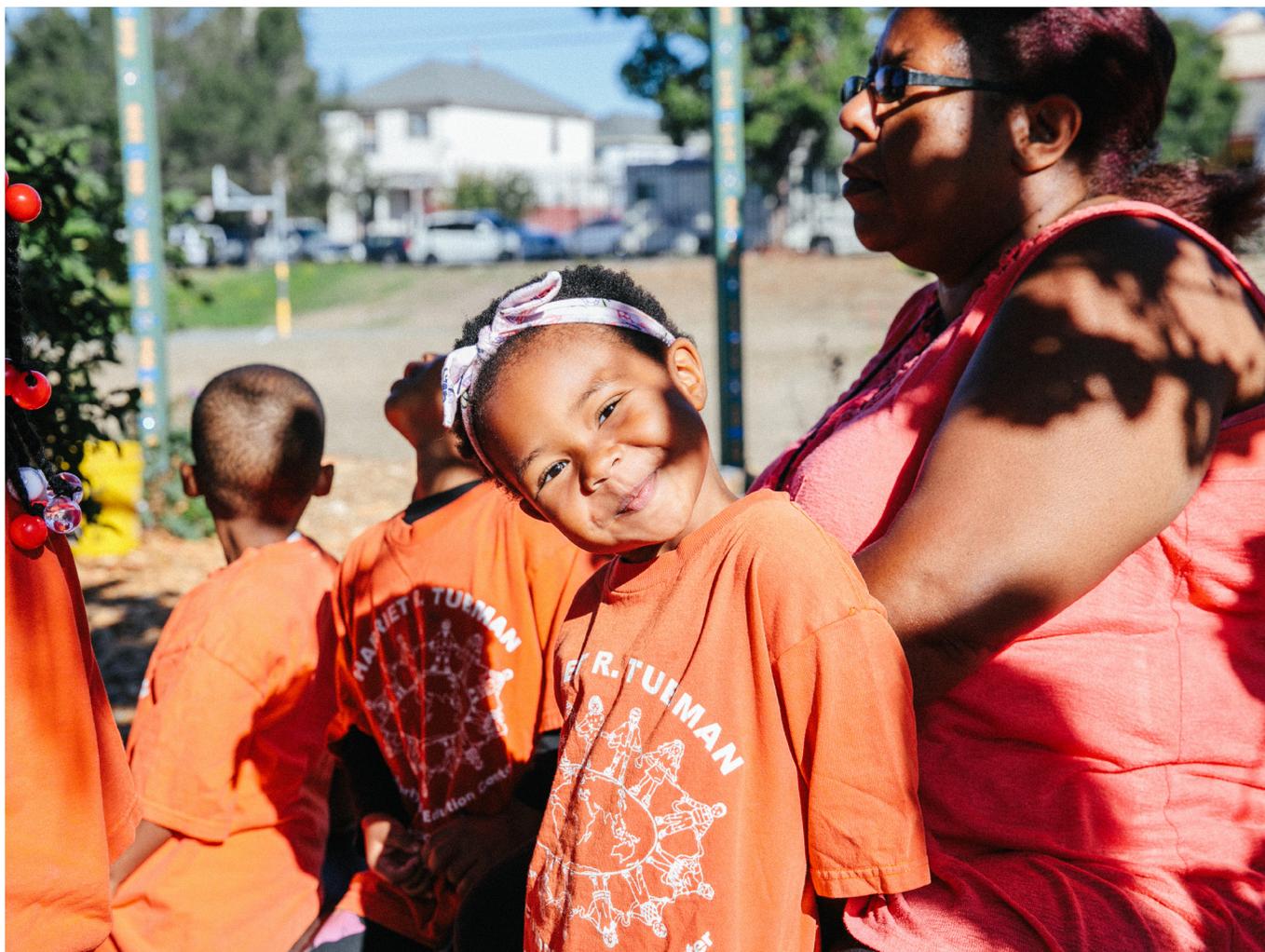
## CONCLUSION

As the strategy approaches its seventh year of implementation, embedded TA has proven to be an invaluable support for the three Starting Smart and Strong communities and the Foundation's Early Learning team. Embedded TA has contributed to the development of a comprehensive early learning system in each community by bringing content expertise to help facilitate long-term sustainable change. Over the course of the strategy, the six initial assumptions held by the Foundation's Early Learning team at the launch of the initiative have held true. Most importantly, the Early Learning team's experience with embedded TA

in a place-based strategy suggests that this type of support can be effective when done in partnership with community. Resources and tools, such as TA, must match the needs of the intended users and be adaptable. As funders, the Foundation's Early Learning team has committed to building relationships and being responsive partners.

It would have been impossible to advance this work if it were not for the people who center trust and love in this work. It takes a village of people who trust communities and are trusted by them.





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