

THE **BIG** LIFT

2023-2026 STRATEGIC PLAN



STRATEGIC PLAN

February 2023

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BACKGROUND

Despite San Mateo County being one of the most affluent counties in the nation, 42 percent of the county’s third-graders cannot read proficiently. Of the San Mateo County students whose families are socioeconomically disadvantaged, roughly 69 percent of third graders are not reading at grade level.

Launched by the County of San Mateo, the San Mateo County Office of Education, and the Silicon Valley Community Foundation in 2012, The Big Lift is a bold collective impact effort that helps more San Mateo County students achieve reading proficiency by third grade. Its initial design drew on four evidence-based interventions recommended by the Annie E. Casey Foundation in 2010, which inspired the national Campaign for Grade Level Reading: high-quality preschool to boost kindergarten readiness, “inspiring summers” programs to prevent learning loss and maintain school year learning gains, attendance efforts to reduce persistent chronic absences, and family engagement to promote home literacy practices.

Since its inception, The Big Lift has worked to align and connect stakeholders around the collectively held priority of advancing third grade literacy with a focus on students who have the most barriers. It is a testament to both the power of the goal of third grade literacy – which is widely thought of as a proxy for setting young people up for future health and success – and the dedication of those carrying out the work, that the work goes on despite the challenges inherent in collaboration related to maintaining the attention and investment of a broad range of stakeholders needed to advance this important goal.

Several factors converge to make this the right time for The Big Lift to reimagine its next phase of leadership and implementation. In addition to 5 years of evidence and feedback identifying strengths and areas for improvement from its pilot phase, the larger early learning landscape has changed with historic new investments in early learning, most notably increased funding for the California State Preschool Program and the passage of universal transitional kindergarten (UTK). At the same time, the field as a whole is still recovering from the disruption of the COVID-19 pandemic and its attendant impacts on families, staffing, and the already fragile early childhood infrastructure. Finally, The Big Lift’s leadership and backbone structure has undergone significant changes in personnel and institutional representation, leaving questions about how decisions are made and who holds accountability for The Big Lift’s efforts and investments. For all of these reasons, this point in The Big Lift’s journey represents a critical opportunity to chart a path for the next three years.

Strategic planning is about making choices about how to strengthen a change model as well as ensuring the ability to implement that change model. A wide range of Big Lift stakeholders shared their perspectives as a part of this planning process as to how to accomplish these imperatives.

This Strategic Plan presents a series of strategies and associated goals for evolving The Big Lift’s program model and governance and organizational structure to position the initiative to have maximum impact on 3rd grade reading levels in San Mateo County. Because of the significant successes achieved by The Big Lift to date, the strategies and goal presented in this document represent a focusing and strengthening of The Big Lift, not a wholesale reimagining of or departure from the core features of the model. In addition to describing what success will look like 3 years from now, this document sets The Big Lift up for making more foundational decisions about the identity and purpose of the collective impact initiative that will seed an articulation of, and commitment to, to the future it wants to create.

STRATEGIC PLANNING COMMITTEE

The stewardship of the planning process was held by a **Strategic Planning Committee**, comprised of implementing partners and other key stakeholders of The Big Lift:

- Mike Callagy, County Executive Officer, San Mateo County
- Marco Chavez, Deputy Superintendent, Educational Services Division, San Mateo County Office of Education
- Heather Cleary, Chief Executive Officer, Peninsula Family Service
- Anne-Marie Despain, San Mateo County Libraries Director
- Kitty Lopez, First 5 San Mateo County, Executive Director
- Nancy Magee, San Mateo County Superintendent of Schools
- Marchelle Moten, Executive Director, PreK-3 and Early Education, San Mateo County Office of Education
- Justin Mates, Assistant San Mateo County Executive
- Pauahi McGinn, San Bruno Park School District Director of Child Development
- Diego Ochoa, Superintendent, San Mateo-Foster City School District
- Jennifer Pifeleti, Director of Education & Operations, Izzi Early Education
- Dave Pine, San Mateo County Supervisor, District 1
- Christine Thorsteinson, Director of Early Childhood Development Silicon Valley Community Foundation
- Amy Wooliever, Superintendent, La Honda-Pescadero Unified School District

Several Big Lift staff members also participated on the Strategic Planning Committee:

- Stephanie Coy, County of San Mateo
- Gina Quiney, County of San Mateo
- Diana Harlick, Coordinator, Early Learning Initiatives & Evaluation, The Big Lift, San Mateo County Office of Education
- Carine Risley, Deputy Director of Library Services San Mateo County Libraries

DATA COLLECTION METHODS

- **Interviews with external stakeholders.** LFA conducted one-hour video interviews with 19 Big Lift stakeholders to gain perspectives and insights about the value and impact of The Big Lift and areas of opportunity to inform the strategic planning process. Interviewees included:

- Laura Armanino, Recreation Manager, City of South San Francisco
- Pam Bartfield, Director of Curriculum & Instruction, San Mateo-Foster City School District
- Jill Cannon, Former Principal Investigator, Big Lift Evaluation, RAND Corporation
- Lisa Chamberlain, Associate Director, School of Medicine, Stanford Center on Early Childhood
- Sheryl Chan, San Mateo County State Preschool Manager, SMCOE
- Noelia Corzo, County Supervisor, District 2, San Mateo County Board of Supervisors
- Theresa de Dios, Senior Executive Director, Peninsula Family YMCA
- David Fleishman, Executive Director, 4Cs of San Mateo County
- Marcos Garcia, Director of Education Services, South San Francisco Unified School District
- Greg Land, President & Board Trustee for SMUHSD, San Mateo County School Boards Association
- Jennifer Larocque, Jefferson Elementary School District
- Justin Mates, Assistant San Mateo County Executive
- Sean McPhetridge, Superintendent, Cabrillo Unified School District
- Dave Pine, County Supervisor, District 1, San Mateo County Board of Supervisors
- Louise Rogers, Health System Chief, San Mateo County Health System
- Pat Sasso, Literacy specialist and former Raising a Reader Manager
- Gina Sudaria, Superintendent, Ravenswood City School District
- Rebekah Tyson, Literacy Coach, La Honda-Pescadero Unified School District
- Liz Wolfe, Assistant Superintendent, Redwood City School District

- **Big Lift member input.** A 90-minute interactive strategic plan information and input session was held at a November 10, 2022 in-person convening of stakeholders of The Big Lift, and another was held at a December 8, 2022 in-person convening of The Big Lift's Knowledge Network.
- **Desktop Review.** LFA conducted desktop research of documents specific to The Big Lift (e.g. Program Evaluation and Implementation reports by the RAND Corporation) and relevant to community need and funding environment (e.g. San Mateo County Child Care Needs Assessment, 2022-2023 Budget Summary from the Office of California Governor Gavin Newsom).
- **Constituencies not yet consulted.** Input from parents and community members as well as teachers was considered for incorporation into the planning process, but it was determined that there was not sufficient time built into the planning process nor resources available to honor the time and contributions of these constituencies. However, this plan incorporates ideas for how to structurally incorporate input and engagement from these groups as a part of the governance and organizational structure of The Big Lift moving forward.

WHAT WE DISCOVERED: FEEDBACK ON THE PILLARS

Stakeholder conversations surfaced valuable feedback on The Big Lift's four current pillars, as well as what is missing from the model:

High-Quality Preschool. There is widespread support and enthusiasm for the high-quality preschool pillar. It is considered by many to be foundational to the work of The Big Lift and a significant driver for participation in the initiative, given its impact on strengthening instructional quality and funding preschool slots. Interviewees see opportunities to strengthen this pillar by embedding explicit literacy instruction in preschool classrooms and supporting greater instructional alignment with K-12 schools.

Inspiring Summers. Stakeholders value The Big Lift Inspiring Summers (BLIS) pillar because it addresses summer learning loss while serving as a much needed resource for families who otherwise cannot afford child care in the summertime. It is also seen as important for children who have not had the opportunity to go to preschool or who are not in year-round preschool programs. Interviewees also offer suggestions for ways to improve the design and implementation of the program, including increasing the focus on literacy development and improving the quality of curriculum and instruction.

Family Engagement. There is a general sense that family engagement is a critical component to supporting early literacy, though there are different opinions of how to do it, the role The Big Lift should play in this area, and if/how it should interact with other strategies under The Big Lift.

Attendance. Feedback on attendance as a pillar was generally critical, with significant skepticism about the value of addressing attendance through a text- or mail- based messaging program to families, especially because it was confusing to parents to be receiving information about their children's attendance from an unfamiliar third party.

When asked what is missing from The Big Lift model, interviewees suggest that there is a valuable opportunity for the Big Lift to provide **targeted support for teachers, in preschool through third grade, to provide high quality, explicit early language and literacy instruction.**

WHAT WE DISCOVERED: TYPES OF COLLABORATION

A collective impact model assumes no single entity can carry out the work of an initiative and therefore collaboration among partners is necessary. Our analysis of the collected data suggests that collaborative activity in the Big Lift has coalesced around four areas of work: local implementation; peer learning; data sharing; and cross-county branding and outreach.

- **Local Implementation.** This type of collaboration is about strengthening relationships between peer organizations delivering parts of the collective impact model within a geographic area (defined by District coverage in the case of The Big Lift) in order to increase service alignment and share resources to support the needs of young children and their families. While each local TBL collaborative operates very differently, examples of collaborative objectives include cross-program knowledge building (for instance, through comparing practices), relationship building, sharing of teacher sub lists and waitlists for kids, identification of gaps in services, and joint implementation of activities (such as trainings, community outreach, and pandemic response). Reported challenges include that it took more work than expected to collaborate (particularly in small school districts), difficulty getting the right people around the table, turnover in staffing, misalignment among partners, and how to structure collaboration, including how to establish meaningful purpose/agendas. Participants suggested a stronger flow of information to local collaboratives about what TBL is doing and what supports are available, as well as data to inform program improvement.
- **Peer Learning.** This type of collaboration is about cultivating a sense of solidarity among peers (e.g., Knowledge Network, superintendents, teachers, preschool directors, family support specialists) across communities, to facilitate learning from each other and outside experts about what works. Participants reported being able to identify common issues, and share strategies, resources, and staff across communities. They noted that this takes extra time and effort, and it's not always clear if a convening will be valuable or worthwhile to attend. While some participants suggested that more thought be given to determining which parts of TBL can most benefit from peer learning supports and to designing and delivering shared learning, some felt strongly that a focus should be on instructional practices for teachers along the pre/TK-to-3 grade pathway.

WHAT WE DISCOVERED: TYPES OF COLLABORATION (cont'd)

- **Data Sharing.** Collaboration around data such as Vertical Change and the Knowledge Network is about generating common indicators and aggregating data to measure – and help tell the story of - collective success, inform program improvements, and focus collaborative efforts. Participants shared that these joint efforts increased their capacity and know-how for measurement, led to common use of a kindergarten readiness assessment, and the development of a common database that is easy to use (and provision of good support for its use). Some stakeholders were not satisfied with how or how much data were shared back with them, and that delays in data sharing have made it difficult to do community-level planning. Some also reported that data collection requirements create burdens on teachers. There were calls for more technical assistance for data collection, management, and analysis, and a recognition that cleaning, management, and analysis of data across geographies are needed to yield greater insights that contribute to continuous improvement.
- **Branding and Outreach.** Efforts to engage broad community support help raise the profile and promote common understanding of TBL and the importance of 3rd grade literacy across the county. Participants noted that TBL is not broadly known in the community, and there is uncertainty about how TBL relates to and affects broader countywide systems such as the health system and cradle-to-career efforts. They suggested that regular convenings, more consistent and high quality communications, staff support for coordinating events, speakers, and joint learning opportunities, and an activated network of champions to amplify messages would help promote TBL's vision and cultivate future investors in the initiative.

WHAT WE DISCOVERED: GOVERNANCE AND BACKBONE

While Big Lift stakeholders are generally coalesced around the key success indicator of improved third grade reading levels, participants reported a lack of clarity about TBL's overall vision for impact, and how all the initiative components are envisioned as an integrated effort working toward the goal of third grade reading proficiency. A perceived consequence of this lack of clarity is that Big Lift members are not yet taking full advantage of the resources, expertise, and engagement that each have to offer, both individually and collectively.

An Implementation study on The Big Lift conducted in 2019 by the RAND Corporation identified several other challenges related to governance, decision-making, and the backbone function of The Big Lift that have continued into the present, and may in fact have been exacerbated as leadership of The Big Lift evolved over time to account for shifts in personnel and institutional participation.

First, there is a lack of clarity about who makes decisions, how they're made, and what opportunities exist for input from individuals not part of the decision-making structure. Also, there is confusion about roles due to some conflation of governance (who owns The Big Lift) and program management/implementation (who implements it) that happened as a result of personnel and organizational transitions. Under a collective impact model, these two functions should be differentiated to ensure transparency, and perceptions shared by some participants that leadership feels too top-down should be considered for their potential impact on eroding buy-in and ultimately participation.

Second, participants have noted that implementation quality and support have been inconsistent, raising questions about the efficiency and clarity of the backbone function of The Big Lift, particularly as it is carried out by four different entities: the County of San Mateo, the San Mateo County Office of Education, the San Mateo County Executive's Office, and the San Mateo County Libraries.

At a foundational level, the evolution to Measure K as the primary source of funds to support TBL efforts has introduced uncertainty about fidelity to the collective impact model as well as the ongoing sustainability of the initiative, since Measure K funds are not guaranteed.

WHAT WE DISCOVERED: CHANGES IN THE EARLY CHILDHOOD FUNDING LANDSCAPE

The state of California is making historic investments in its youngest learners. In 2021, legislation was passed requiring any local education agency or school district operating a Kindergarten program to also provide a Transitional Kindergarten (TK) program for all 4-year-old children by 2025-26. The 2.7 billion dollar program began phasing in 2022, with each year expanding to include more children based on their month of birth.

State-funded TK will provide more options for families, support more subsidized preschool openings for 3-year-olds, and provide some financial relief to families for the cost of childcare. Enrollment in TK is voluntary; parents have the ability to choose their preferred preschool or child care option, and can elect to combine TK with another preschool or afterschool program if full-day services are needed. The San Mateo County Child Care Needs Assessment assumes that at least 40% of 4-year-olds will be in TK by 2032, shifting the unmet need for preschool to younger children as universal access to TK is achieved over time.

Governor Newsom's 2022-2023 Budget Summary includes \$690 million to support the second year of TK expansion. In addition, \$4 billion has been made available for the Expanded Learning Opportunities Program, supporting schools to add three hours of afterschool programming and six weeks of summer enrichment programming, and \$250 million has been allocated to expand upon the existing Literacy Coaches and Reading Specialists Grant Program, intended to hire and train literacy coaches and reading specialists in high-poverty schools.

These new state funding streams present an opportunity for The Big Lift to reconsider how current program funds are allocated. Historically, The Big Lift has devoted resources to funding preschool spaces and quality. With state funds shifting to address those needs, there is room for conversation about the ongoing distribution of Big Lift dollars. The Big Lift will need to understand at a deeper level how these new funding streams work, what new amounts of revenue will be available to San Mateo County and over what timeframes, and how to support districts' uptake of those resources. A more thorough analysis of these elements will provide the specificity needed to determine how Big Lift resources should be reallocated over time.

STRATEGIES

The primary challenge (and benefit) of strategy development is selecting a limited number of priorities that an initiative will dedicate resources (both financial and personnel) to addressing and advancing over the period of time covered by the plan. Data collected through stakeholder feedback and document review provided the Strategic Planning Committee clear signals about how The Big Lift should improve its program design to better achieve its mission (referred to as “Mission Strategies”) as well as how to strengthen governance, collaboration, and resource management to ensure maximum operational capacity to deliver on the mission (referred to as “Infrastructure Strategies”).

Due to increased state funding for preschool and Transitional Kindergarten, and an identified need for literacy instructional development, the focus of Mission Strategy development turned to the challenge of figuring out how to shift resources to more intensively scale up rich, evidence-based language and literacy development practices across all of its programs. The Mission Strategies also direct The Big Lift to clarify and strengthen its support to funded partners for engaging families in their children’s literacy development, and articulate a more explicit and intentional focus on advancing equity through both its investments and operations.

To support its next phase of investments and ensure the ongoing performance of The Big Lift as a collaborative endeavor, a set of Infrastructure Strategies prioritize clarifying and communicating The Big Lift’s change model and developing a future funding model that sets a target for ongoing resource needs grounded in logic as to how those resources will be secured. Infrastructure strategies also guide The Big Lift to rebrand and strengthen support for collaborative subgroups, and to identify and implement an updated governance and backbone structure.

To provide The Big Lift with a clear way forward, four Mission Strategies and four Infrastructure Strategies are presented on the following pages, along with:

- A narrative description of why the strategy was selected.
- A goal statement with a 3-year horizon, along with sets of measurable objectives.
- High-level descriptions of activities that will need to be carried out to execute on the strategy.

The goals and objectives named are markers of organizational progress, intended to describe what success will look like in 3-years if the strategies are successfully executed. Child-level outcomes - markers of success of the funded activities of The Big Lift related to 3rd grade literacy development – are generally found in dashboards like the [2021 Kindergarten Readiness Dashboard](#) will eventually be named in a Theory of Change-type outcomes framework prescribed for development in this Strategic Plan.

For the purposes of the following strategies, "Big Lift stakeholders" are defined as any individuals that are directly involved in governance and/or implementation of Big Lift activities, including anyone sitting on a collaborative body that is part of the structure defined in Appendix A or carrying out activities directly funded or supported by The Big Lift.

MISSION STRATEGIES

1

Develop and Operationalize an Equity Framework

Why this is important: The "Overview" section of The Big Lift website notes the racial disparities in San Mateo County for third grade reading levels: while 43% of 3rd graders countywide are not reading at grade level, that number rises to 60% for Black, Latinx, and AAPI 3rd graders. However, there is not a clear articulation of how The Big Lift addresses racial or other disparities in its mission or approach. Clarity about the focal population (who Big Lift is designed to serve) as well as about how equity is defined and incorporated into its change model can inform where and for whom to focus resources.

Why we need to focus on this now: The Big Lift's naming of inequitable outcomes as one of the reasons for its existence compels it to provide a clear explanation of how it works to advance equity. Further, a more clearly defined focal population would help The Big Lift identify and reach into the most effective spaces (for example, afterschool programs or other Districts with inequitable literacy outcomes) for reaching the children that need the most support.

2026 Goal

A documented Equity Framework provides clear guidance to The Big Lift as to how equity is addressed in its mission work as well as within the infrastructure of the initiative

2026 Objectives

- Big Lift outcomes name disparities based on race and/or other identities
- Big Lift investments are prioritized in communities experiencing the greatest inequities in outcomes based on race
- The Big Lift engages affected communities in a way that centers their voice and perspective
- TBL stakeholders report that equity is clearly addressed

Activities

- Form temporary Task Force, reporting to the Steering Committee, to design the Equity Framework
- Gather data about reading levels disaggregated by race and other identities to help inform where there may be structural or systemic changes needed to support families experiencing a disproportionate need
- Determine new approaches and/or revisions to existing approaches to ensure Big Lift services are reaching children and families who need them most, such as those not otherwise able to access preschool, children not at reading level (flagging those not on track as early as possible), children in special education, and Dual Language Learners who need dual focused support in both oral language and literacy development; embed these new approaches or revisions in TBL Theory of Change
- Form and convene Community Advisory Council

MISSION STRATEGIES

2

Build a PreK-3 Focus on Literacy Instructional Quality and Alignment

Why this is important: The pilot period of The Big Lift sought to support young children's development by first supporting improvements in foundational preschool quality, due to research demonstrating the importance of high quality preschool. This was a critical first step, yet did not specifically address language and literacy practices either in preschool or in transitional kindergarten (TK)-3rd school year settings.

Why we need to focus on this now: The collective impact design of The Big Lift provides a unique opportunity to move more intentionally towards design and implementation of aligned literacy strategies and practices in educational settings as early as they are available to children. With increased state funding available for both public TK and state-subsidized preschool, there is a decreased need for resources directly supporting preschool. Furthermore, there is increased appetite from Big Lift districts for, and evidence supporting the impact of, curriculum and other supports to help teachers across grade levels deliver high quality literacy instruction, especially for those students with the greatest barriers.

2026 Goal

Targeted language and literacy instruction aligned with the science of reading reaches 75% of preschool-third grade classrooms in Big Lift districts

2026 Objectives

- Preschool-third grade classrooms in Big Lift districts use curricula and instructional strategies that include an explicit focus on foundational / phonics based decoding skills, with an identified scope and sequence and minutes of instruction
- Preschool-third grade classrooms in Big Lift districts have an identified and intentional strategy to build background knowledge, vocabulary development, oral language, and the alphabetic principle
- Preschool-third grade classrooms in Big Lift districts use a multi-tiered systems of support (MTSS) process to support children who are not at grade and/or age-appropriate levels in early language and literacy skills

Activities

- Identify and support access to common literacy assessments in preschool-third grade that align with the science of reading and MTSS
- Collaborate with national partners to scale targeted, evidence-based language and literacy efforts
- Increase alignment between Preschool/TK and K-3
- Use Science of Reading to inform enhancements to literacy instruction in all grade levels (Pre-3)
- Identify and support specific Dual Language Learner strategies to supplement and integrate within science of reading instructional practices
- Explore opportunities to improve access to literacy instruction for preschool-aged children not enrolled in TBL preschools

MISSION STRATEGIES

3

Ensure High Quality Summer Learning Experiences

Why this is important: Summer learning loss was one of the barriers to early literacy development. The Big Lift was founded to address, and research increasingly reinforces the value of providing summer learning opportunities for children, especially those with limited exposure to formal learning environments. Furthermore, there has been an extremely positive community response to the availability of summer learning opportunities provided to rising Kindergartners to third-graders, under The Big Lift, evidenced by widespread waitlists for the BLIS program.

Why we need to focus on this now: To improve its contribution to third grade literacy outcomes, as well as to continue to provide quality summer experiences for Big Lift focal populations, the BLIS Program should focus on improving preparation of and support for instructors, and increasing the quality of its summer learning curriculum. It is also important to ensure that literacy development is included as a desired program outcome and the corresponding interventions are built into the BLIS Program.

2026 Goal

60% of eligible rising K-3rd graders in TBL districts are enrolled in the BLIS summer learning program

2026 Objectives

- 90% of parents are satisfied with the quality of their children's summer experience via BLIS
- Staff report greater self-efficacy in creating quality educational experiences
- Increased alignment between summer learning curriculum and year-round instructional practices
- Increased alignment of instructional practice with science of reading principles, leading to improved literacy outcomes for BLIS participants

Activities

- Improve and increase outreach to, and enrollment in BLIS, of rising K-3rd graders with the greatest need (for example, children with no preschool and/or struggling readers)
- Identify evidence-based summer literacy interventions and incorporate them as appropriate into summer learning curriculum
- Strengthen alignment with year-round instructional practices
- Expand resources for SE learning support, including curriculum and training for summer learning instructors that addresses classroom and behavior management
- Enhance training experience for summer learning interns
- Provide summer learning interns with supervisors that have mentorship as a part of their job description
- Support BLIS sites to plan 2 family engagement events per summer to connect whole family to their child's BLIS experience

MISSION STRATEGIES

4

Build Focus on Family Engagement in Literacy Development

Why this is important: Big Lift stakeholders agree that family engagement is an important part of literacy development, but are unclear on what The Big Lift does concretely to engage families, leading to hopes and expectations of stakeholders and other community members that are not being met through intentional investment. The Big Lift should clarify how it expects family engagement to be leveraged by funded partners in service of improving literacy, and more clearly identify how current family engagement resources (family resource centers, home visitation programs, etc.) will be enlisted via collaboration and/or capacity building to support in this effort.

Why we need to focus on this now: Given the lack of clarity reported by stakeholders about specific approaches to family engagement employed by The Big Lift to support literacy development, The Big Lift needs to articulate a clear approach – informed directly by parent/caregiver input – to family engagement that addresses attendance as a part of it.

2026 Goal

New family engagement approach, informed by parents/caregivers via Community Advisory Board, is ready for implementation

2026 Objectives

- Every participating school district has a tiered system in place for partnering with parents around literacy development, and to address concerns around attendance
- Every Big Lift community has access to parent/caregiver training or support (building on Raising a Reader) for engaging with their children’s literacy development
- The Big Lift has an identifiable dual capacity building framework, increasing the Family Engagement skills of both educators and families alike

Activities

- Convene Community Advisory Board with family engagement program development as a part of its charge
- Explore evidence-based approaches to family engagement in literacy development
- Work with school districts to provide educators with systematic and ongoing training and coaching support in how to partner with families to achieve literacy goals
- Work with school districts to enhance communications to parents about attendance
- Develop relationships, then partnerships, with family resource centers and home visitation programs (including promotoras); explore opportunities for capacity building around literacy development support by parents
- Explore potentially expanded role of libraries in engaging and providing supports to families around literacy development

INFRASTRUCTURE STRATEGIES

1

Clarify and Communicate Change Model

Why this is important: To promote both accountability and buy-in, collaborative endeavors like The Big Lift need clear Theories of Change to help promote common understanding amongst diverse stakeholder groups about the specific outcomes the work is intended to produce as well as what things are being done by the collaborative to advance those outcomes. Because The Big Lift’s collective impact model includes direct funding of activities (not always a part of collective impact models), it will be important in the change model to distinguish between outcomes that are supported by direct funding vs. outcomes supported by aligning partners and existing resources, the latter of which is needed to address the social, financial, and health supports young children and their families need to be in a position to achieve literacy outcomes.

Why we need to focus on this now: Stakeholders shared that lack of clarity about how The Big Lift works impedes buy-in and therefore limits the potential for impact, calling on The Big Lift to clarify its program model (reflecting any changes that happen as a result of this planning process) via Theory of Change or some similar framework. Once needed clarity around intended outcomes and focal population(s) is established, The Big Lift should develop clear messaging – to Big Lift stakeholders especially, but also to all that live in San Mateo County - about the why, how, and to what end, that it then uses to foster collective understanding and support.

2026 Goal

75% of Big Lift stakeholders report they are "very clear" on The Big Lift's change model and that they "agree" or "strongly agree" that the model is likely to produce the outcomes named in it

2026 Objectives

- Comprehensive Theory of Change developed by 2024 and refined at least 1x by 2026
- Evaluation and Learning Plan developed for reporting on Theory of Change outcome data
- 2024 or 2025 annual meeting includes a presentation of and solicitation of input on Theory of Change

Activities

- Literacy Development Advisory Council leads Theory of Change development process, with input from Shared Learning Collaboratives
- Consult with community providers of social, financial, and health supports regarding their prospective involvement in the change model
- Develop outcomes that are disaggregated based on race and other identities that experience inequitable literacy outcomes
- Design interventions based on what is known to work in reaching focal populations and being culturally relevant
- Design Evaluation and Learning Plan that describes what information will be collected, how it will be analyzed, and how data will be used to inform program improvement
- Provide ongoing training and capacity building to all entities responsible for evaluation-related activities

INFRASTRUCTURE STRATEGIES

2

Identify and Implement Updated Governance and Backbone Structure

Why this is important: Collaborative endeavors like The Big Lift need clear structures and processes to establish buy-in and accountability on the part of the diverse stakeholder groups that are the intended beneficiaries of the collaborative's work, as well as those on whom it relies for implementation of the collaborative's work. A clear structure is also critical for organizing collaborative activity, as – by definition – the work of a collaborative falls outside the resources and charges of its participating entities.

Why we need to focus on this now: Big Lift stakeholders shared feedback that there is a lack of clear authority and accountability for The Big Lift, that backbone supports have been too inconsistent, and they would like more transparency regarding how decisions are made. Furthermore, recent shifts in structures due to changes in personnel and institutional roles have made supporting and coordinating the work of The Big Lift even more challenging. To effectively enlist the participation of all actors who have something to offer to advance 3rd grade literacy, TBL needs to clarify its governance model with a focus on both structure and decision-making, and determine what backbone model will be put into place to ensure capacity to support implementation.

2026 Goal

New governing body is up and running with a clear structure (including sub-entities), decision-making model, and backbone infrastructure

2026 Objectives

- By 2024, a governing body is designed with a clear charge and decision structure (see Appendix B for prototype)
- By 2024, a single entity is selected or created to manage implementation of The Big Lift including staffing support for key functions
- By 2025, three advisory councils are up and running (see Appendix C)
- Governance structure(s) enable meaningful parent/caregiver input and engagement, through and beyond the Community Advisory Council

Activities

- New Steering Committee determines governance and backbone structure based on funding model
- Finalize design for, and begin implementation of, new Steering Committee; should include a set of officer positions identified for leadership
- Design and convene three advisory councils that will have input but not decision-making authority (see Appendix C)
- Create “job description” for backbone entity and design and implement selection process (see Appendix D)
- Host Annual Congress to reflect on Big Lift progress and generate feedback about needed strategy adjustments
- Governance body meets quarterly to ensure accountability and make strategic decisions regarding the performance and direction of The Big Lift

INFRASTRUCTURE STRATEGIES

3

Refocus and Strengthen Support for Implementation Collaboratives

Why this is important: A core challenge for collaborative endeavors is ensuring that stakeholders and implementing bodies involved are clear on how collaborative activity is structured and what their expectations (and benefits) of participation are. This strategic planning process has clarified two key types of collaborative activity that The Big Lift should be supporting to ensure effective implementation: Local Coordination collaboratives (organized by participating School Districts) and Shared Learning collaboratives (grouped by the three Pillars).

Why we need to focus on this now: While there are implementation collaborative bodies of both of these types in place, stakeholders shared that lack of clarity about the purpose and function of these bodies is limiting their potential value and impact. Increasing clarity about and support for these implementation collaboratives can help The Big Lift unlock significant potential to accomplish their respective objectives: Local Coordination collaboratives (supporting achievement of TBL goal across the Pillars) and Shared Learning collaboratives (supporting achievement of Pillar activities across Big Lift geographies).

2026 Goal

90% of Implementation Collaborative members report that their participation is “valuable” or “very valuable”

2026 Objectives

- Local Coordination collaboratives have workplans that clearly articulate goals, objectives, and needed resources, including locally-based leadership of the collaboratives
- Implementation Collaborative members report confidence that the Collaborative is operating in a data-informed way
- Shared Learning collaboratives have workplans that are anchored to the Theory of Change and identify needed resources

Activities

- Create and vet with stakeholders a proposal for shifting and strengthening existing Implementation collaboratives
- Develop charges, recruitment and membership policies, and work plans for each of the Implementation collaboratives
- Ensure longitudinal preschool through third grade data are available through The Big Lift’s robust data strategy, and are leveraged to identify the early learning experiences making the most difference in closing early achievement gaps
- Support Local Coordination collaboratives to identify leadership and ensure each collaborative is activated

INFRASTRUCTURE STRATEGIES

4

Determine Future Funding Model

Why this is important: Once sourced by multiple funding streams, including philanthropic support from SVCF and a large federal Social Innovation Fund grant, The Big Lift is now almost exclusively funded by San Mateo County Measure K funds. The County has invested over \$40 million in Measure K half-cent sales tax revenue in The Big Lift as a statement of commitment to its work. With no fund development strategy in place, critical decisions for The Big Lift to make that will influence the scope and nature of investments it can provide in the future include: 1) are there potential foundation or corporate revenues that could be secured to support The Big Lift over time; and 2) would a parcel tax or other locally-based tax be feasible as a long-term funding stream for The Big Lift.

Why we need to focus on this now: Because The Big Lift's future scope of work (what and how much it decides to take on) and governance model (which entities should have decision authority) are highly dependent on the amount and sustainability of revenue it secures, determining the future funding model is critical to informing important decisions about how the initiative is structured and led. The future funding model should take into account increases in state and federal funding for preschool, out of school time, and how they impact local investments and funding strategies.

2026 Goal

3-year Revenue Plan in place with staffing and infrastructure needed to implement it

2026 Objectives

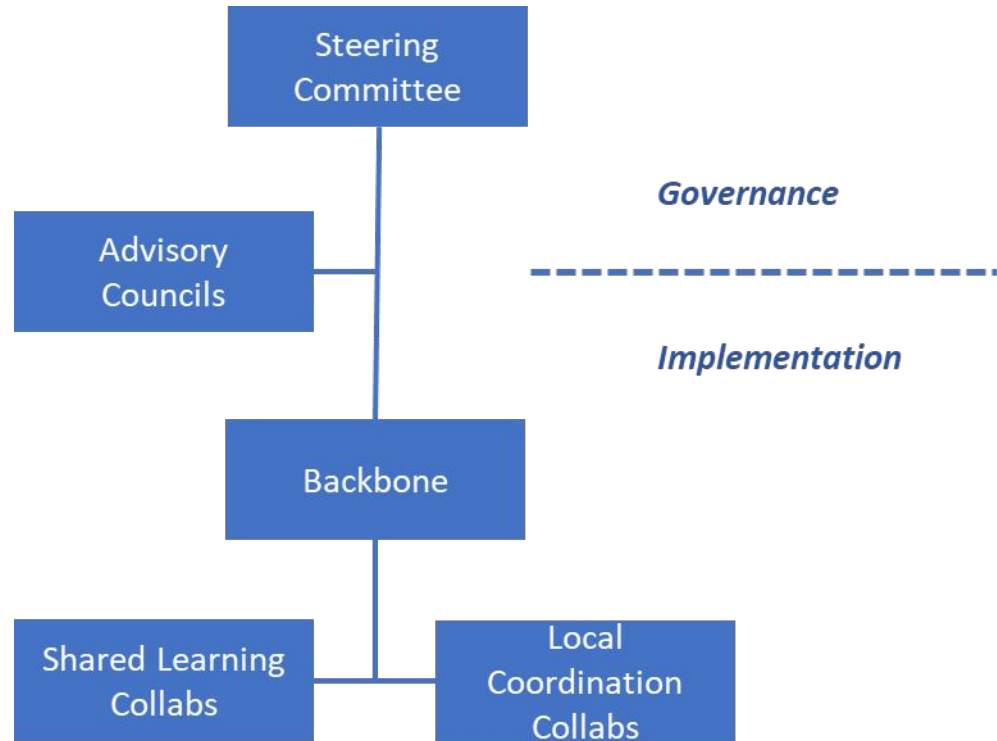
- Feasibility study for future funding completed by 2024
- Staff in place with the capabilities for securing ongoing revenue by 2025
- Outreach and cultivation plan for new revenue sources in place by 2025
- New revenues secured by 2026

Activities

- Provide technical assistance to TBL grantee partners to maximize draw-down of available foundation, state and federal resources and determine whether and how matching funds should be established as a requirement for TBL funding eligibility
- Research funding models of counties and local jurisdictions that have dedicated funding streams for children 0-8, and explore feasibility for San Mateo County of tax-based revenue; use results to inform TBL and its partners how to maximize draw-down of available foundation, state and federal resources
- Meet with 3-5 large foundations in the area to explore interest
- Meet with 3-5 corporations in the area to explore interest
- Draft 2027-2029 budget based on projected revenues

APPENDIX A: OVERALL COLLABORATIVE STRUCTURE

The Big Lift will be governed by a Steering Committee comprising a cross-section of key stakeholder organizations with representation across Big Lift functions and geographies. The Steering Committee will design and convene three advisory councils to extend participation to a broader set of stakeholders who will have input but not decision-making authority. A single Backbone entity, selected and overseen by the Steering Committee, will be charged with managing the implementation of the Big Lift, including providing staff support for the key functions of The Big Lift. Implementation at the geographic unit level will be supported (as it is currently) by local coordination collaboratives that each Big Lift grantee is charged with convening. Implementation of the pillars will be supported by a shared learning collaborative for each pillar (comparable to currently functioning subgroups including BLIS, Knowledge Network, etc.).



APPENDIX B: STEERING COMMITTEE ROLE

At the highest level, the Steering Committee is composed of cross-sector leaders, decision-makers, and community members who provide strategic direction, champion the effort, and align participating organizations’ work and resources to the common agenda, i.e., sets agenda/priorities; determines strategies/solutions and working groups (for each pillar); selects Backbone.

While the exact size and composition of the Steering Committee is yet to be determined, participation of the following types of entities should be considered: San Mateo County BOS, The San Mateo County Executive’s Office, The San Mateo County Office of Education, First 5 San Mateo County, Child Care Planning Council, Silicon Valley Community Foundation, San Mateo County Libraries, Superintendent representing local districts, a higher education institution. Liaisons (ex-officio) from each of the Advisory Councils should also be considered for representation on the Steering Committee.

Governance role	Description of governance role	Recommended governance action(s)
Provide overall strategic direction	Assess context and community assets (potential partners). Define common agenda and goals for collective impact.	In response to the evolution of TBL and its changing context, and to ensure synergy, the steering committee will approve a Theory of Change developed by the Literacy Development Advisory Council so that all partners can see their roles and how they can contribute to the achievement of the common agenda.
Determine strategies/solutions and working groups	Identify key strategies for achieving common agenda and goals. Establish working groups for implementation.	To ensure productive effort by partners and stakeholders, the steering committee will designate collaboratives for local implementation and shared learning (by pillar), with clear objectives, processes, and supports.
Set agenda/priorities	Create an annual plan that serves to align participating organizations’ efforts around the common agenda.	The steering committee will formally adopt the new strategic plan and assign duties for implementation to Backbone (see “Implementing Structure” below) and to partners. It will host an annual Congress to celebrate progress of the prior year, consider new data, and set/adapt priorities for the coming year.
Select/supervise Backbone	Provide oversight of the work of the backbone entity that is tasked with facilitating implementation of the annual work plan.	To ensure clear lines of responsibility for oversight and management, the steering committee (or its designees) will conduct monthly coordination meetings with the Backbone.
Fiscal responsibility	Approve an annual budget developed by the backbone entity, approve grants/contracts, set fundraising targets. Ensure Measure K reporting requirements to BOS are fulfilled.	To ensure adequate and proper use of funding resources, the steering committee will develop an annual budget to resource the annual plan.
Champion the effort	Promote (via communications and relationship building) the aspirations of, and support for, TBL among key stakeholders, including fundraising efforts.	To ensure long-term support for TBL, the steering committee will set up and engage Impact, Literacy Development, and Sustainability advisory councils (see below for descriptions),and conduct an annual Congress.

APPENDIX C: ADVISORY COUNCILS

We recommend that the Steering Committee set up three advisory councils to provide dedicated support to several critical functions of The Big Lift while enlisting the participation of a broader (outside the membership of the Steering Committee) range of stakeholders:

A Community Advisory Council charged with stewarding The Big Lift's Theory of Change, including reviewing outcomes data and making recommendations to the Steering Committee for how to refine and continuously improve the interventions implemented by The Big Lift in service of 3rd grade literacy levels. This is anticipated to comprise primarily parents/caregivers, community members, and direct service providers.

A Literacy Development Advisory Council charged with reviewing research and best practice in literacy development along with community data and feedback and making proposals for how to strengthen The Big Lift's interventions based on what we know works. This is anticipated to comprise data/research experts as well as experts in literacy development, summer learning, and family engagement.

A Sustainability Advisory Council charged with identifying and supporting implementation of a fundraising model to promote the ongoing sustainability of the initiative. This is anticipated to comprise primarily business, philanthropic, and public agency leaders.

APPENDIX D: BACKBONE ROLES

The implementing support roles for The Big Lift should be consolidated into a single agency (vs four currently) to provide clear lines of accountability, eliminate possible conflicts of interest between implementing agencies, and to promote efficiency. A Big Lift Director position (anticipated to be full time) should be created to lead and hold primary accountability for implementation support for The Big Lift. Other key staff and/or consulting roles would be established within this consolidated structure, including responsibility for literacy interventions, collaboration, data, communications, and fund disbursement, to ensure staff capacity to fulfill the implementing structure responsibilities, which entail:

Backbone Role	Description of backbone role	Recommended backbone action(s)
Coordinate with Steering Committee	Provide data, prioritize opportunities, and suggest ways to adapt to changing conditions in order to set and act on common agenda and goals, while keeping equity as a central focus.	To ensure clear lines of responsibility for oversight and management, the Backbone will set agendas and conduct monthly coordination meetings with the steering committee (or its designees).
Support aligned activities	Facilitate dialogue between partners, provide direct support for Steering Committee, advisory council, and working group meetings as needed, and generally help to coordinate the actions across TBL.	To ensure productive effort by partners and stakeholders, support relationship-building and alignment of action.
Establish shared measurement practices	Manage data collection among partners and support data for learning and evaluation of TBL.	Based on the Theory of Change developed for TBL, work with the steering committee and the Impact and Literacy Development advisory councils to identify appropriate process and result metrics and set up processes/practices to share and use data to inform improvements in implementing TBL strategies.
Manage and mobilize resources	Manage the disbursement of funds that have been secured to carry out Big Lift activity. Cultivate, manage, and steward resources for TBL's sustainability, including fundraising for the Backbone itself and recruiting volunteers or other non-monetary support.	Support the Steering Committee and Sustainability advisory council in developing the TBL annual budget, setting fundraising goals/plans, executing transactions, and coordinating with the advisory council on long-term sustainability. It will provide an annual report on Measure K spending and outcomes, and submit annual or bi-annual funding proposal/request, to BOS as well as any other funders that come into play.
Build community engagement and ownership	Cultivate broad relationships throughout San Mateo County in coordination with the Steering Committee and working group members, seeking to build an inclusive effort that authentically engages and fosters ownership within the community over the long term.	Support communications and community engagement activities, including logistics for the annual Congress and media efforts.
Monitor policy environment	As the effort matures, look to advance a policy agenda that impacts large systems and institutions in support of TBL's overall goals.	Support identification of opportunities to inform and influence policy efforts that could support TBL.

APPENDIX E: OPTIONS FOR BACKBONE ENTITY

Many different types of organizations can fulfill the backbone roles outlined in Appendix D. Within the context of The Big Lift, the steering committee can consider the following options, weighing the relative strengths and challenges each would bring in relation to each of the backbone roles identified in Appendix D:

- County Executive's Office, County of San Mateo
- San Mateo County Office of Education
- An existing, locally-based nonprofit agency that would be identified through an RFP process
- A new nonprofit agency, like "Friends of The Big Lift," that would be established for this purpose
- A new governmental unit (similar to Santa Clara County's new Office of Children and Families Policy) would be established with the backbone role as part of its function

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