



FINAL REPORT | July 2024

The William J. and Dorothy K. O'Neill Foundation

2Gen Deep Impact Grantmaking Strategy Assessment Project

Prepared by James Bell Associates



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Executive Summary

In 2018, the William J. and Dorothy K. O'Neill Foundation (Foundation) initiated the two-generation (2Gen) Deep Impact Grantmaking (DIG) strategy, which provides multiyear support and partnerships to organizations and communities committed to developing or deepening a 2Gen approach to serving families. The Foundation's DIG strategy aligns with the 2Gen framework of Ascend at the Aspen Institute. This framework is guided by five core principles.

- Measure and account for outcomes for both children and their caregivers
- Engage and listen to the voices of families
- Ensure equity
- Foster innovation and evidence together
- Align and link systems and funding streams

Since 2018, the Foundation has invested over \$10 million and funded 20 grant partners (grantees) through multiyear, flexible funding awards. The DIG strategy provides grantees with funding for project planning and implementation and includes learning and professional development opportunities for grantees related to family-centered service delivery. In addition to helping grantees develop or deepen a 2Gen approach in their community, the Foundation has contributed to building the 2Gen field through its support of leaders, such as Ascend and the Literacy Cooperative of Cleveland. These investments have connected grantees with 2Gen experts and resources, provided opportunities for learning and

Report at a Glance

The Foundation has been influential in shifting organization mindsets and helping establish a 2Gen approach. Grantees reported incorporating family voice to inform decision-making, serving more families, increasing or enhancing staff trainings, updating intake processes, and strengthening evaluation practices. Grantees also reported being able to enhance partnerships and collaboration.

Grantees shared many examples of changes at the family level that they attribute to the 2Gen approach, and many grantee observations align with client experiences. Both grantees and clients described increased empowerment and self-confidence, social capital and connection, economic mobility, and educational attainment. Grantees shared insights about facilitators and barriers to successful implementation of a 2Gen approach, many of which align with those identified by experts in the field and the 2Gen literature.

Overall, there are many strengths to the 2Gen DIG strategy and grantees repeatedly expressed appreciation for the Foundation's approach. The strategy has contributed to many positive changes at organizational and system levels, which are linked to positive outcomes for families. Additionally, the contribution to field building has supported policy- and practice-change efforts at the national level and within the grantee communities.

sharing, and helped strengthen organizational capacity to implement 2Gen services. Other field building activities include reporting and evaluation activities and video storytelling to convey the positive impact of the 2Gen approach on families, service providers, and community systems.

The Foundation contracted with James Bell Associates (JBA) to conduct an evaluation of the Foundation's 2Gen DIG strategy. JBA implemented the *2Gen DIG Strategy Assessment* study to assess the perceived impact of its strategy, documenting and sharing learnings with the field, and recommending ways to refine the strategy moving forward. The 1-year study began in July 2023 and ended July 2024.

The study used a mixed-methods approach that included document reviews, a grantee questionnaire, interviews with grantees and clients, expert interviews, and a literature and resource review. The evaluation had three primary study questions.

1. What is the perceived impact of 2Gen DIG funding on organizations, systems, and policies?
2. What is the perceived impact of a 2Gen approach on families?
3. What are the facilitators and barriers to implementing 2Gen best practices?

From January to February 2024, a total of 17 grantees completed a questionnaire, 18 grantees participated in interviews, and 9 clients from 7 grantee organizations participated in interviews.

DIG Grantees

As of July 2024, the Foundation has supported 20 grantees through 33 planning/demonstration, implementation, and/or continuation awards. 2Gen DIG grantees are in Ohio, New York, Maryland, Vermont, Hawaii, and Washington, D.C. Grant recipients include single agencies and multiagency partnerships that provide a diverse array of services to support child, adult, and whole-family well-being. Many grantees work across multiple sectors, such as healthcare, education, and employment.

Although services offered across grantees vary, grantees described similar 2Gen mindsets and related organizational cultures. They explained it is essential to consider all members of a family and each person's needs to make meaningful change. This approach to supporting families requires integrating multiple services and programs. Grantees used Foundation funds in multiple ways—to implement a new program or service (41 percent), enhance an existing program or service (29 percent), and support both new and existing programs or services (29 percent). Within these new or enhanced programs and services, they established or strengthened partnerships, provided direct assistance to families, hired new staff, and purchased program or office supplies.

Perceived Impact of DIG Funding

Many grantees described specific ways in which Foundation funds positively impacted their organization. They shared that 2Gen DIG funding helped strengthen their organizations' overall 2Gen approach, shift organizational culture, and implement changes that enhanced service delivery for the whole family. Some of the most common changes include incorporating family voice, hiring new staff and expanding client reach, implementing a new service or program, providing additional staff training, and updating intake processes or forms.

Grantees spoke of many ways in which 2Gen DIG funding positively impacted their work, though the primary impact on systems that grantees described was developing new partnerships and strengthening existing ones. Many explained that implementing a 2Gen approach requires a robust and collaborative network of partner agencies to work together to ensure all family member's needs are met. While some agencies offer multiple services internally, many organizations rely on partner agencies to address the complex needs of entire family units.

Grantees also shared many examples of changes at the family level attributed to the 2Gen approach, and many of their observations align with client experiences. Both grantees and clients observed or experienced increased empowerment and self-confidence, social capital and connection, economic mobility, and educational attainment.

Implementation Facilitators and Barriers

Grantees shared insights about factors that facilitate successful implementation of a 2Gen approach and, conversely, challenges that may arise when undertaking these efforts. Many facilitators and barriers align with those identified by experts and in the literature. Factors that support implementation include flexible funding, long-term investment, strong partnerships, and staff buy-in. Barriers to implementation include limited staff time, limited funding, uncertainty around funding sustainability, and structural or systemic barriers (e.g., policies that interfere with accessing care, difficulty with Medicaid reimbursement, stigma associated with certain services, and issues some organizations may not be able to address, such as housing, transportation, or food insecurity).

Opportunities for DIG Funding

There are many strengths to the Foundation's DIG strategy, and grantees repeatedly expressed appreciation for the Foundation's approach. A key theme that emerged across study activities is the need to balance a flexible funding approach with the ability to demonstrate improved caregiver, child, and family outcomes.

Opportunities to Revise the DIG Strategy to Move Grantees Toward Demonstrating Whole Family Impacts

The recommendations described below are intended to standardize the use of data to inform practice and support effective implementation. While several grantees used funds to support third-party evaluations or evaluation-related practices, the current unrestricted funding approach means efforts are not uniform across the DIG portfolio. This limits the Foundation's ability to assess the impact of its investment. The Foundation may add five strategies to the current DIG funding approach to help grantees use data for quality improvement, measurement of meaningful outcomes, and ultimately, help them move toward being able to demonstrate impacts for families.

- *Set aside funding for evaluation in every grant.* Grantee evaluations should examine how programs are implemented, how they integrate caregiver and child services, and the level of intensity (i.e., dosage, duration) of those services. Measuring these process indicators can strengthen implementation and identify opportunities for program improvements (e.g., using learnings to adjust service delivery and ensure programs are effectively meeting the needs of caregivers and children).

In addition to measuring process indicators to understand the quality and intensity of services, it is important for programs to measure caregiver and child outcomes to understand how services may be impacting families. A logic model is a powerful way for 2Gen initiatives to visually articulate intended process indicators that capture inputs (specifically measures related to program activities, services, and work performed), outputs (e.g., number of caregivers and children served, number of referrals, number of staff trainings), and their linkages to intended outcomes (e.g., increases in parenting and career skills, gains in caregiver educational attainment, improved school readiness of children, improved parent-child interactions). While all DIG grantees have a logic model, few seem to use them to inform data collection or assess the relationship between activities and outcomes. The Foundation has an opportunity to help grantees use logic models to strengthen program implementation, data collection practices, and examine the link between activities and intended outcomes. Intentionally funding evaluations and quality improvement efforts as part of a grant allows organizations to allocate the time and resources needed to collect, analyze, and report data. Ensuring evaluation is a dedicated part of someone's role and protecting staff time to support evaluation activities helps organizations move toward a quality improvement mindset where data can inform decision making.

- *Include intensive, individualized technical assistance (TA) for all grantees.* Building intensive, one-on-one TA support around program design, evaluation, and quality improvement can be critical to helping grantees build their capacity around using data for program improvement. A TA approach should be tailored to each initiative's unique structure of integrating services and consider what data are collected and shared. TA can help grantees find opportunities for sharing data across partner organizations to more holistically understand child, caregiver, and family outcomes. Data sharing is critical to understanding the extent to which caregiver and child services are integrated as well as the outcomes associated with a 2Gen initiative. It can enhance service coordination and reduce the likelihood of duplication of services.

Building one-on-one TA support for each grantee can help them build their capacity around using data for program improvement. Targeted TA, either through the Foundation or a third-party

provider, can support grantees in developing and refining the logic model of their 2Gen initiative, help identify implementation challenges, and articulate pathways from activities to the intended short- and long-term outcomes. Access to these kinds of supports can help grantees identify the measures that are most meaningful for the programs and establish a data system or data sharing mechanisms to track caregiver and child outcomes.

- *Narrow the focus of the grantee portfolio and increase the investment in each grantee to examine the impact of a 2Gen approach.* Grantees vary widely in the use of data to better understand and improve service delivery. Evaluations can support grantees in using evidence to inform decision making, which may ultimately improve the quality and effectiveness of their programs and result in more impactful investments. To offset the costs of embedding evaluation and one-on-one TA to grantees, the Foundation may consider narrowing the focus of the grantee portfolio so the investment in each grantee can be deeper and more impactful than at present. Focusing on a specific outcome (or set of outcomes) or a specific sector could make this happen. Deepening the investment with fewer grantees can help build evidence about 2Gen initiatives while also supporting grantees in providing high quality, effective services.
- *Review and revise reporting tools to ensure information collected minimizes grantee burden and helps the Foundation determine whether it is meeting its goals.* As part of the unrestricted funding approach, grantees have flexibility in how they report activities, outputs, and outcomes. Although the Foundation requires them to submit certain process indicators (e.g., number of families served, demographics) in a standardized format, there is substantial variation in how grantees report outcomes. Reporting could be simplified by requiring grantees to report on standardized forms only what the Foundation specifically needs to understand progress toward achieving strategic goals. This would minimize grantee burden while also providing sufficient information to understand the impact of the DIG investment. The Foundation could provide a reporting template that includes clear instructions, requires minimal narrative, and is flexible enough to align with the grantee's self-identified process and outcome measure as reflected in their logic model.
- *Identify and communicate a long-term vision for the Foundation's 2Gen investment.* As part of a strategic vision, the Foundation can specify goals for each multiyear funding cycle. Although long-term family outcomes can take generations to attain, the Foundation can identify short term outcomes that are measurable, closely linked to the 2Gen guiding principles, and attainable within a 4- to 5-year funding cycle. Once the Foundation develops a strategic plan for how to move forward, articulate it to partners and potential partners. Communicating a long-term plan with grantees can help them plan for sustainability and understand how a deeper investment can result in a deeper impact within their community.

Aspects of the Current DIG Strategy to Continue

In addition to these opportunities for revising the DIG strategy, the study identified strengths in the current funding strategy that align with best practices in the field. Below are opportunities to strengthen or maintain aspects of the current funding strategy moving forward.

- *Continue flexible funding in multiyear grants.* The Foundation can maintain flexibility in how grantees use funds (e.g., how they fund partnerships, service delivery, staff trainings) while also ensuring necessary supports are in place to further quality improvement and sustainability. This

flexibility in how funds are used can help ensure programs are tailored to community needs and support the organizational capacity for effective services. Also, continuing to invest in communities through multiyear grants allows organizations to implement sustainable practices.

- *Continue to support the inclusion of family voice in the work.* Grantees emphasized the importance of family feedback in their 2Gen approach. Incorporating family voice helps ensure services support the goals and needs of clients and align with best practices. Authentically engaging current and former clients in decision making and integrating their feedback is consistent with the Foundation's equity principles and can help ensure program decisions are inclusive of those impacted directly from services. Funding family engagement as part of the DIG strategy can ensure grantees allocate time and funds to support family engagement opportunities in their budgets and can help move them further along the continuum of engagement. It also ensures clients are appropriately compensated for their expertise.
- *Continue to support and strengthen systems coordination and multisector collaboration.* Strong, multisector partnerships are critical to delivering integrated services to caregivers and children and providing wraparound supports. While intentional and effective collaboration can result in more streamlined and holistic services than siloed provision, it can be challenging to attain. To mitigate common challenges, the Foundation may continue to support strong partnerships that allow organizations to align and link services. Recognizing that the grantee organization (or multiple organizations in cases of shared partnership) must assume an added burden, future grants should support grantees in developing a plan for partnership and allocating sufficient funds and staff time to support successful partnerships.
- *Continue the field-building work the Foundation is doing to connect grantees to resources and to each other.* The Foundation's investment in field-building through its support to Ascend and the Literacy Cooperative of Cleveland, have helped grow the field and strengthen the capacity of 2Gen providers. These field building activities have helped connect grantees with resources, offer learning opportunities, and build organizational capacity to implement 2Gen services.

The Foundation has made substantial contributions to the 2Gen field through its partnership with grantees and its support of field building efforts. The 2Gen DIG strategy has contributed to many positive changes at organizational and system levels, which grantees and clients link to positive outcomes for families. Additionally, its contribution to field building has supported large policy- and practice-change efforts at the national level and within the Foundation's grantee communities. The Foundation's investment coincides with a period of rapid field expansion and is an example of how smaller family foundations can contribute to a larger, collective movement that shapes policy, laws, and practices.



Introduction

The William J. and Dorothy K. O’Neill Foundation (Foundation) is dedicated to supporting families and communities and has implemented a grantmaking approach that aligns with this goal. In 2018, the Foundation initiated the two-generation (2Gen) Deep Impact Grantmaking (DIG) strategy, which provides multiyear support and partnerships to organizations and communities committed to developing or deepening a 2Gen approach to serving families.

The Foundation’s DIG strategy aligns with the 2Gen framework of Ascend at the Aspen Institute. This framework is guided by five core principles.¹

- Measure and account for outcomes for both children and their caregivers
- Engage and listen to the voices of families
- Ensure equity
- Foster innovation and evidence together
- Align and link systems and funding streams

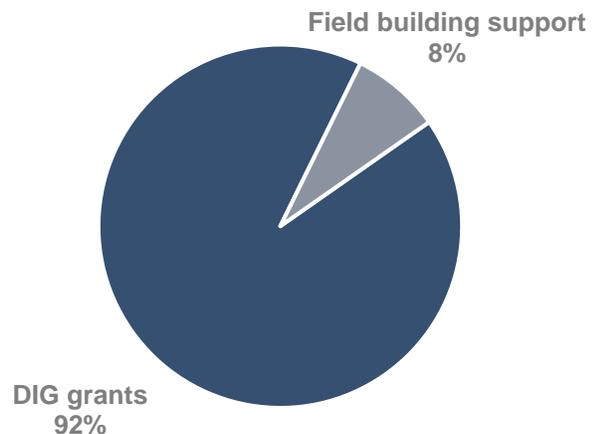
2Gen approaches to service delivery, sometimes referred to as Whole Family Approaches, intentionally coordinate and align services for caregivers and children to holistically serve the entire family. 2Gen initiatives offer a range of supports, including housing assistance, employment services, early childhood and/or adult education, and physical and/or mental healthcare. Integrated services simultaneously meeting the needs of caregivers and children can positively impact individuals and families more effectively than services offered in isolation (Chase-Lansdale & Brooks-Gunn, 2014; Sama-Miller et al., 2017; Mosle & Sims, 2021). Programs that utilize a 2Gen approach to service delivery can support economic security and overall family well-being (Baumgartner et al., 2023; Mosle & Sims, 2024).

The William J. and Dorothy K. O’Neill Foundation supports effective nonprofits who work in partnership with their communities toward a shared vision of health, safety, and empowerment.

¹ Ascend has defined core principles to guide 2Gen policy, practice, and systems change. For more information on the core principles, see <https://ascend.aspeninstitute.org/2gen-approach/>.

Since 2018, the Foundation has invested over \$10 million and funded 20 grant partners (grantees) through multiyear, flexible funding awards.^{2,3} The DIG strategy provides grantees with funding for project planning and implementation and includes learning and professional development opportunities related to family-centered service delivery. In addition to helping grantees develop or deepen a 2Gen approach in their community, the Foundation has contributed to building the 2Gen field through its support of leaders, such as Ascend and the Literacy Cooperative of Cleveland. These investments have connected grantees with 2Gen experts and resources, provided opportunities for learning and sharing, and helped strengthen organizational capacity to implement services. Other field building activities include reporting and evaluation activities and video storytelling to convey the positive impact of the 2Gen approach on families, service providers, and community systems. See Exhibit 1 for an allocation of funding across efforts.

Exhibit 1. Allocation of DIG Funding, 2018–2024



The 2Gen DIG strategy promotes positive change at the family, organization, and systems levels, and the Foundation’s support has the potential to positively impact outcomes for thousands of families across the country.

Purpose of the Deep Impact Grantmaking Strategy Assessment Study

The Foundation contracted with James Bell Associates (JBA) to conduct an evaluation of the Foundation’s 2Gen DIG strategy. JBA implemented the *2Gen DIG Strategy Assessment* study to assess the perceived impact of strategy, documenting and sharing learnings with the field, and

² The study focused on learnings from 18 implementation grantees.

³ DIG funding includes planning/demonstration, implementation, and program related expense grants. Program related expense grants helped grantees fund staff training for family-centered coaching, stipends for parents to participate in program and leadership development, emergency support to help stabilize families still reeling from the pandemic, database investments, subsidized travel to participate in person in national Ascend convenings, and video storytelling.

recommending ways to refine the strategy moving forward. The 1-year study began in July 2023 and ended July 2024.

The study used a mixed-methods approach to meet three overarching goals. These are described below.



Goal 1: Learning. Add to the knowledge about 2Gen strategies and how the DIG strategy influences organizations.

- Understand the perceived impact of 2Gen strategies on families
- Understand the perceived impact of DIG funding on organizations, systems, and policy
- Document the facilitators and barriers to implementing 2Gen best practices
- Capture the perception of Foundation family members and staff

Activities: Document review; discussions with Foundation staff, DIG committee, grantees, and parent advisors; grantee questionnaire; interviews with grantees and clients



Goal 2: Recommending. Use what is learned to provide the Foundation and the larger 2Gen field with actionable strategies.

- Identify recommendations and best practices broadly used in the 2Gen field
- Identify feasible ways the DIG strategy could be enhanced or improved

Activities: Literature and resources review; expert interviews; identification of strategies; identification of assessment and reporting strategies



Goal 3: Sharing. Share findings and recommendations to help broadly expand the Foundation's impact on the 2Gen field.

- Share findings and recommendations with the Foundation and others in the philanthropic community
- Share findings with grantees and other 2Gen organizations
- Share findings with study participants
- Leverage existing networks to amplify findings

Activities: Dissemination of findings through websites, presentations, and summary report

Study Questions and Participation

The three primary evaluation study questions are listed below.

4. What is the perceived impact of 2Gen DIG funding on organizations, systems, and policies?
5. What is the perceived impact of a 2Gen approach on families?
6. What are the facilitators and barriers to implementing 2Gen best practices?

From January to February 2024, a total of 18 DIG grantees and 9 clients were invited to participate in the study. Participation was voluntary. A total of 17 grantees completed a questionnaire, and 18 grantees participated in an interview. Nine clients from 7 grantee organizations also participated in interviews.⁴ See Appendix A for additional detail about the study methods.

⁴ Five of the nine client interviews were conducted in Spanish.



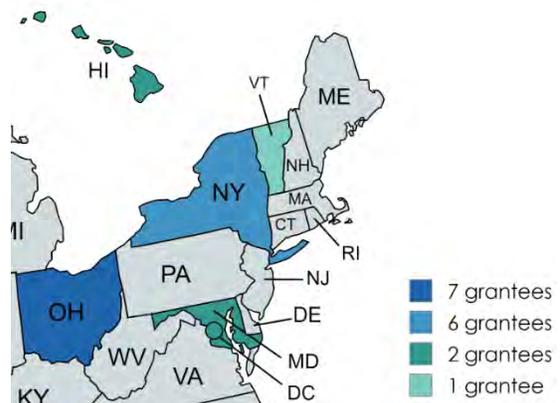
DIG Grantees

Grantees implemented a range of services to meet the goals for their 2Gen approach and the desired outcomes for caregivers, children, and families. While services offered to families varied, they described similar 2Gen mindsets and organizational cultures.

The Foundation initiated its 2Gen DIG strategy in 2018 with 5 grants and, as of July 2024, has supported 20 grantees through 33 planning/demonstration, implementation, and/or continuation awards. Planning/demonstration grants supported organizations as they developed partnerships, assessed organizational capacity needs, and developed a 2Gen action plan. Implementation grants were provided to organizations with an emerging or existing 2Gen approach and helped grantees refine their models, address barriers, build new partnerships, and expand or strengthen 2Gen service delivery. Continuation awards continued or expanded 2Gen efforts that began during an implementation grant period. This chapter provides information about the implementation grantees and their 2Gen approaches to serving the whole family.

The Foundation supported grantees in Ohio, New York, Maryland, Vermont, Hawaii, and Washington, D.C. See Exhibit 2 for a map of 2Gen DIG grantees by state. Grant recipients include single agencies and multiagency partnerships that provide a diverse array of services to support caregiver, child, and whole-family well-being. Many grantees work across multiple sectors, such as healthcare, education, and employment. Please see Appendix I for additional information about each grantee.

Exhibit 2. 2Gen DIG Grantee Locations



2Gen Approach

Although services offered across grantees vary, grantees described similar 2Gen mindsets and organizational cultures. Grantees explained that, to make real change, it is essential to consider all members of a family; no individual exists in isolation and each person has different needs. There is no “cookie-cutter” approach to supporting families, and centering the family requires integrating multiple services and programs to address each family member’s unique needs.

Folks can't move forward unless everybody in the family system is able to thrive.

—Grantee

We're looking at the whole family versus the whole person. Looking at the whole person is great, but if they leave and they still have barriers and challenges with the rest of the family when they go home, they aren't likely to return because they have other priorities that are competing with what we're trying to help them with.

—Grantee

To make changes within families, **you have to look at the entire family.** It's the only way to make progress. If we want to make real change, we have to look at the entire picture.

—Grantee

We're looking at **the entire household, the entire family**, and meeting the needs and the goals of everyone in that household. Because we recognize that when we remove all of the barriers in the household, that's what helps families reach their goals.

—Grantee



Goals and Desired Outcomes

Grantee goals for their 2Gen approaches include improving outcomes for caregivers, children, and families. Across the DIG portfolio, grantees looked to improve similar outcomes. Caregiver-level outcomes include improved physical and emotional well-being, as well as increased empowerment and self-esteem, economic mobility, and educational advancement. Child-level outcomes include physical and emotional well-being, school readiness, and academic opportunities and success. Family-level outcomes include improved family functioning and parent-child relationships, increased social capital, and the ability to meet basic family needs.

We're really trying to strengthen and empower the parents.

—Grantee



Services and Activities

To meet their goals and desired outcomes, grantees implemented a range of services and activities. Many described an attempt to provide a “one-stop shop,” by co-locating services for caregivers and children or by working closely with partner agencies to ensure all family needs are met.

All grantees provide services for caregivers; fewer serve children directly, but referrals are offered as needed. Child-focused services at grantee agencies include education, healthcare, and access to resources. Services for caregivers include coaching and mentoring, financial counseling, parenting classes, workforce development and career services, education and academic assistance, mental health supports, parent support groups, healthcare, and direct assistance. Services for the whole family include reading programs, art workshops, cooking classes, and concurrent educational opportunities.

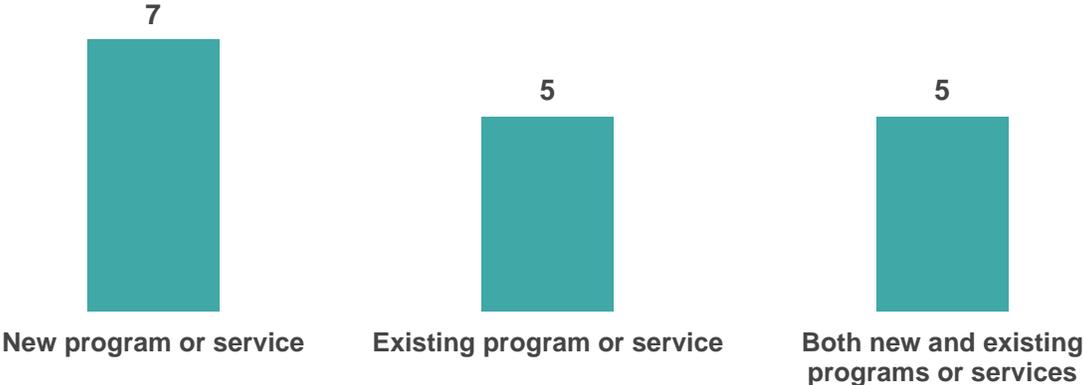


How DIG Funds Were Used

Grantees used Foundation funds in multiple ways. As Exhibit 3 illustrates, responses to the grantee survey indicate seven grantees used funds to implement a new program or service, five used funds to enhance an existing program or service, and five used funds to support both new and existing programs or services.⁵

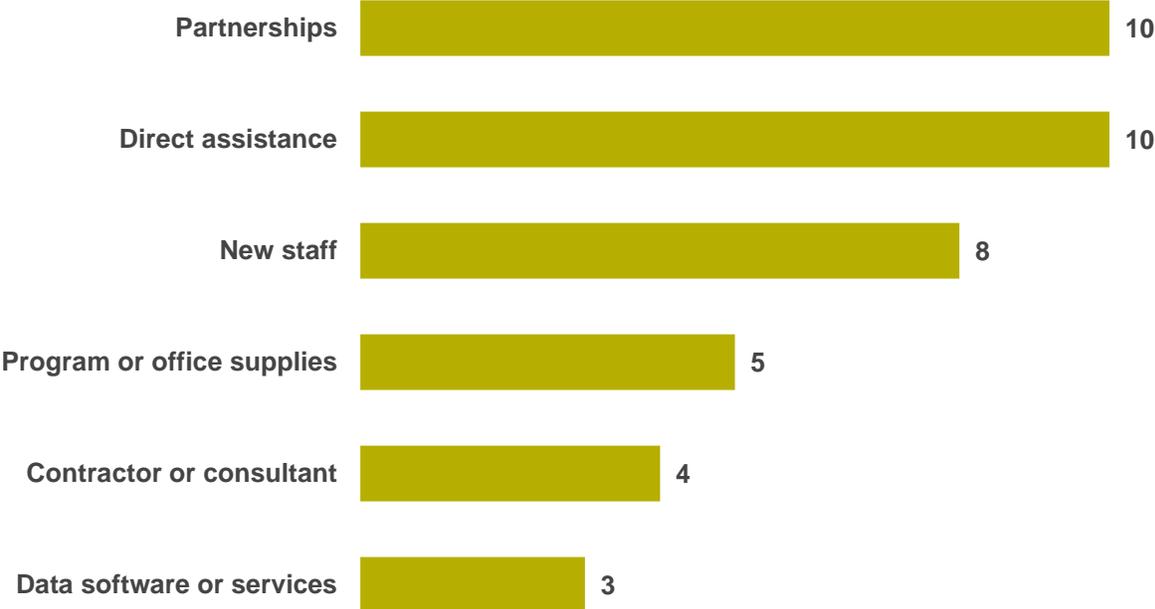
⁵ Seventeen grantees completed the questionnaire, and 18 participated in interviews.

Exhibit 3. Funds Supported New and Existing Programs



Within these new or enhanced programs and services, grantees established or strengthened partnerships, provided direct assistance to families, hired new staff, and/or purchased program or office supplies. The diversity of ways in which grantees used the funds illustrates the many ways in which the Foundation’s unrestricted funding approach can support organizations as they implement a 2Gen approach. Exhibit 4 shows how grantees used funds.

Exhibit 4. How Grantees Used Foundation Funds



Parents could receive a teaching certificate for free while their children went to class at the same school. When they were done with their teaching certificate, they could do their internship at the same school or class their child was enrolled in, or [at] one of the other early learning sites.

—Grantee

We have lots of perinatal care coordinators. We also have navigators. We provide transportation. We provide diaper services. We do CenteringPregnancy as well as CenteringParenting. We have doula services. We have nutrition services. We also have WIC on site. **We try to just cover everything.**

—Grantee

We have a WIC, a medical-legal partnership, ophthalmology, and a variety of specialties of pharmacy. We do summer programs for children and their families. There are clothing drives, donations, food donations. We've partnered with a supermarket that's right next door and have family cooking classes.

—Grantee



Perceived Impact of Funding

The Foundation has been influential in shifting organization mindsets and helping establish a 2Gen approach. Grantees reported incorporating family voice to inform decision making, serving more families, increasing or enhancing staff trainings, updating intake processes, and strengthening evaluation practices. Grantees also reported being able to enhance partnerships and collaboration.

Grantees shared many examples of how the Foundation funding influenced their organizations, the services they provide, the systems in which they work, and the families they support. Many of their perceived impacts align with the desired goals and outcomes presented in the previous chapter. In addition to findings from grantee interviews, survey, and other documents, this chapter incorporates findings from interviews with nine clients from seven grantee agencies.

Exhibit 5 summarizes grantee and client perceptions of funding impact, and the subsections following describe each finding in more detail.

Our 2Gen work has really evolved with the use of this grant. We really became intentional about looking at the needs of the whole family.
—Grantee

Exhibit 5. Grantee and Client Perceptions of Impact

 Perceived impact on organizations	 Perceived impact on systems	 Perceived impact on families
<ul style="list-style-type: none"> • Incorporated family voice • Served more families by starting or expanding program • New or enhanced staff training • Updated intake process • Strengthened data and evaluation practices 	<ul style="list-style-type: none"> • Strengthened partnerships and collaboration 	<ul style="list-style-type: none"> • Empowerment and self-confidence • Social capital and connection • Economic mobility and educational attainment

Organizational Change

Many grantees described specific ways in which Foundation funds positively impacted their organizations. Grantees shared that DIG funding helped their organizations overall by strengthening their 2Gen approach, shifting their culture, and implementing changes that enhanced service delivery for the whole family. Some of the most common changes included incorporating family voice, hiring new staff and expanding client reach, implementing a new service or program, providing additional staff training, and updating intake processes or forms.



Incorporated family voice

One of the most common perceived impacts on organizations was a shift toward elevating family voice and integrating family feedback in programming and decision making. Family voice and client feedback were gathered and incorporated in a variety of ways: establishing parent advisory groups, implementing surveys or introducing new opportunities for families to provide feedback, and hiring former clients and individuals with lived experience to ensure family representation on staff. Several grantees compensated families for their time and input and acknowledged the importance of financially recognizing client contributions and valuing client time and expertise. Grantees emphasized how important family feedback is to their 2Gen approach, and how it helps ensure services align with the goals and needs of the individuals they serve.

We're asking for levels of feedback that we've never asked about before, which really makes families feel valued and that their input makes a difference.

—Grantee

We've been able to implement our **family advisory council**, and the funds assist with that because we are able to compensate families for their participation. We really value families' time, and their time is important. Providing them with a stipend helps with that mutual respect piece. It's one thing to say that we respect your time, but if I'm paying you, that shows that we respect your time.

—Grantee

We are intentional about **gathering information and feedback** from the people we serve.

—Grantee

Make sure that the voices of the families are always heard. And one of the ways that you can do that is to bring them on your staff. We have done that by way of community navigators who have lived certain experiences, have been in the community for years, and can make inroads in ways that community-based organizations can't.

—Grantee

Grantee Highlight: Rutland County Parent-Child Center and Sunrise Family Resource Center

Rutland County Parent-Child Center and Sunrise Family Resource Center used Foundation funds to develop, pilot, and implement a new program that elevates family voice and helps families build social capital. It brings family members and their navigators, or service providers, together for a meal once a month to build and strengthen relationships and to gather family feedback on organizational policies and practices. Rutland's and Sunrise's focus on parent leadership has informed new approaches to working with families, in which family members feel like they're on more of an equal playing ground and have something to offer.



Served more families by starting or expanding program

Many grantees used Foundation funds to start a new program or expand an existing service, which in turn allowed them to serve more families. Part of starting or expanding a program is ensuring adequate staffing. Multiple grantees explained this support provided funding to hire new staff—family coaches, perinatal health workers, home visitors, intake coordinators, emotional wellness clinicians, program coordinators, English as a Second Language coaches, and father’s group co-facilitators. New programs and services supported by the funds include pediatric family-centered prevention-based care, family coaching, screening and referral services, direct assistance, community events, and family arts workshops.

The funding from the O’Neill Foundation has helped us expand our program.

—Grantee

We would not have been able to do the program if it weren’t for the grant. We didn’t have prevention-based care before. It really changed how we practice and how families can access services.

—Grantee

We’ve increased our service capacity. Around the time that we entered into the grant, I believe we were still serving about 350 moms and families per year. Now we’re serving closer to like 450, 480 moms per year. Unrestricted support basically just ensures that we can continue doing what we need to do and continue to grow our impact.

—Grantee

It’s been very, very important in terms of expanding our reach and effectiveness with the families. More families served, capacity building to our facilitators, community engagement.

—Grantee



New or enhanced staff training

In addition to hiring new staff to start or expand programming, grantees used DIG funds to introduce or enhance staff training. Grantees spoke of organizational transformation occurring as a result of being able to provide professional development opportunities for staff related to family-centered coaching and mentoring, facilitating parent advisory groups, learning new data systems, and working with partner agencies.

Some **funds were used to support training staff**. That has benefited the program as well as the agency, in terms of starting the 2Gen work. Thanks to the funding, we were having monthly meetings and learning from [the trainers]. They gave us little tidbits on how to engage the families, to engage the kids. The whole structure is best practice for us.

—Grantee

It was necessary for us to develop a system that would allow us to see notes from one another, to have direct referrals to one another. That consisted of **training the different staff** as well as meeting monthly with both the leadership and direct service providers. In order to account for the different time and effort that it takes to learn the system as well as manage it, it is beneficial to be able to offer them an honorarium, and we've been able to support that work with the O'Neill funding.

—Grantee

Four of our staff and alumni went through **training on how to run a parent advisory committee**. We would not have gotten this far without the emphasis on the parent advisory group. And that came out of the second part of this grant.

—Grantee



Updated intake process

Grantees explained that an important component of supporting the whole family is reducing burden and breaking down barriers to accessing services. Many grantees described rethinking or refining their intake processes, which included redesigning intake sessions, updating intake forms, and providing additional training to staff and partners to ensure everyone knows what is available and how to address family needs.

We really try to be intentional about making it a seamless process where there's no wrong door.

—Grantee

Families were kind of going all around town when they could have just stayed internally. **We changed a lot of our intake forms** because...we would never ask questions about if you had other people at home that needed help, if you had children that you need to take care of. So, we started asking if you had children, if so, how old were they? And if they were age-eligible, do you have care for them?

—Grantee

A lot of it is **making sure that our team is aware of who the ecosystem of partners are and the services that they provide**. It's important to make sure that our staff remains abreast of all of the services and resources available to our clients.

—Grantee

The model was spearheaded and, in part, made possible through the 2Gen initiative funds, and it enables us to be able to assist families directly instead of only making a referral. Being able to **alleviate some of those barriers; being able to knock down that time restriction for families to receive services**.

—Grantee

Grantee Highlight: The Centers

Through the receipt of planning and implementation grants, The Centers, located in Cleveland, OH, has transformed its intake process, designed a tracking system, and implemented several programs that address the needs of multiple generations. The Centers used Foundation funds to:

- De-silo the organization and ensure all staff members know what services The Centers provides and how to connect clients to other services internally.
- Update the intake process to make sure all adults are asked if they have anyone at home that needs help or any children or dependents that need childcare, and, conversely, to ask adults looking for childcare whether they need other services.
- Implement a program that links workforce development with the early learning group. In this program, parents from the early program would receive a free teaching certificate while their children went to class at the same school. The Centers would pay for the training; and once the training is finished, the parent could complete a paid internship at their child(ren)'s school or class or select another site.
- Implement a perinatal program that linked prenatal services, primary healthcare, behavioral health, workforce, basic needs resource center, and early learning home visiting.
- Develop a database to track participants in the perinatal program and document information about their family composition, family member needs, and other services they were receiving. Information from the database helped The Centers leverage Foundation funds to receive additional funding from the City of Cleveland, which allowed the hiring of additional staff to serve more clients.

This robust 2Gen approach includes meaningful changes in organizational processes, which are linked to improved outcomes for clients.



Strengthened data and evaluation practices

Several grantees used DIG funding to expand data collection and analysis efforts or work with external evaluators to examine program implementation and impact. While some chose to support evaluation-related activities with Foundation funds, this was not required and many did not use funds in this way. Among those that described data-related changes at their agencies, they introduced opportunities for clients and families to provide feedback, administered surveys or interviews, and developed new tracking systems or databases. In some cases, the ability to more concretely and intentionally gather information allowed grantees to better capture outcomes and leverage findings to receive additional funding.

The O’Neill funds really allow us to do the external evaluation that we otherwise maybe wouldn’t have been able to do.

—Grantee

The O’Neill Foundation allowed me to start a tracking database. With this system that we were able to design with the O’Neill grant, we could show the outcomes to City of Cleveland saying, "Hey, with a little bit more funding, look what we can do." The database also allowed us to apply for additional funding with different philanthropic agencies and different grants.

—Grantee

For us to scale our programming and to grow as an organization, we also need to grow our evidence base. So, we've put a lot of effort into **cleaning up data and evaluation processes.**

—Grantee

Systems Change

Grantees shared many examples of the ways in which Foundation funding positively impacted their work, though the primary system-level change they described was building and strengthening partnerships with other family-serving organizations.

Strengthened partnerships and collaboration



Many grantees explained that implementing a 2Gen approach requires a robust and collaborative network of partner agencies that work together to ensure all family members' needs are met. Grantees shared stories of transformation related to building and strengthening partnerships and spoke of the essential role partnerships play in serving the whole family. Some grantee agencies offer multiple services internally, but many rely on partner agencies to address the complex needs of entire family units.

It takes a village and probably two or three interventions to really get all the way to 2Gen.

—Grantee

We're really strategic about working with partners who are enhancing our capability to meet the needs of our families. **Expanding our reach through our partnerships has allowed us to fully implement a 2Gen focus.**

—Grantee

I think one of the best things that has come out of this particular programming is **our collaboration that's now happening with other agencies**. It has really opened up the capacity for us to really explore why families aren't getting their needs met in a much different and more in-depth way than we ever have before.

—Grantee

We all work at different organizations, but we sound like we work at the same agency because **we're all aligned in our belief in working with whole families** on the 2Gen approach.

—Grantee



Perceived Impact on Families

Grantees shared many examples of changes at the family level that they attribute to the 2Gen approach, and many of their observations align with client experiences. Both grantees and clients observed or experienced increased empowerment and self-confidence, social capital and connection, economic mobility, and educational attainment.



Empowerment and Self-Confidence

Grantees and clients reported increased caregiver empowerment and self-confidence. Many grantees connected this outcome to organizational changes related to strengthening relationships with families, elevating family voice, engaging families in decision making, and implementing family-centered coaching. Grantees explained that asking families to set their own goals and then helping them achieve those goals created a sense of pride, agency, and self-determination.

It makes you feel good about yourself.
—Client

It provided them with some confidence, a **belief that they could do something different, that they could change the trajectory of their lives**, the ability to see themselves differently. The ability to feel like they could change their child's life.

—Grantee

They have increased personal and family pride. They have **increased confidence** knowing that they can achieve greater or higher levels of education and training.

—Grantee

It really seems to have a ripple effect on a lot of different areas in their lives. They **become more confident** becoming an advocate for their child. They become more confident within their own community.

—Grantee

Social Capital and Connection



Grantees and clients reported stronger relationships and increased connection with others. Clients described the support they felt from grantee agencies and the friendships they made with other parents. Grantees shared stories of clients building peer networks and expanding their circles of support.

They make me feel like [part of] a big family that is fighting to open more doors for moms like me.

—Client

We've seen families be able to step up and **have more peer communication and assisting one another**. And the funds enabled us to sustain that.

—Grantee

Having that **sense of connectedness**, they're community building. It connects the kids with one another, the kids with their parents.

—Grantee

I think sometimes it's so hard for them to put it in words because they didn't even realize what they were missing until they've had one of us there, sitting with them, listening, answering questions for them, really dedicating some time just to them. I think that it has been life changing. The greatest impact is what we have done through **our relationships with them**.

—Grantee



Economic Mobility and Educational Attainment

Many grantees and clients reported changes in caregiver economic and education outcomes. Both grantees and clients shared stories of economic mobility and educational attainment, and many linked these outcomes to meeting basic needs and providing for their families.

They helped me find the job I have been working at for the past 18 months.

—Client

We were able to support her for the 2 months it took for her to build enough money and capacity to help herself, to get her own transportation, to get her own food, and diapers, and wipes for her baby. And **she graduated from the program, and she is now working as a peer support specialist.** And she was able to move to a new apartment with that. She just needed that little help for her and her son.

—Grantee

By participating I was able to acquire many things I didn't have, including studies. The program allowed me to **complete some certification courses.**

—Client

They helped us feel **empowered with our finances**, like how to make a budget. I had always saved money, but not like this.

—Client

While grantees and clients spoke primarily of outcomes related to the caregivers or entire family, several grantees shared stories of how their 2Gen approach helped ensure children have access to what they need. When child-serving institutions do not understand a child's home situation—or when caregiver-serving institutions do not know about child or family needs—opportunities to support both the individual and the family are limited. Several grantees described situations in which their 2Gen approach supported children's developmental and educational outcomes. Examples shared by these grantees include—

- Helping a parent ensure their child made it to the bus each day, which increased that child's attendance in school
- Making sure the family coach sets goals with children to help identify ways that flexible funds can support their hopes and aspirations
- Providing training to parents that helps them develop an awareness of the whole child's growth and development beyond standard classroom topics such as learning letters and numbers



Implementation Facilitators and Barriers

Grantees shared insights about factors that facilitate successful implementation of a 2Gen approach and, conversely, challenges that may arise when undertaking these efforts. Many facilitators and barriers align with those identified by experts in the field and the literature.

Factors that Support Implementation

- **Flexible funding.** Grantees spoke highly of the strategy of providing unrestricted funds, sharing that flexible funding allowed them to meet unique family needs and pivot as necessary, both in response to the Covid-19 pandemic and in response to changes the families experienced.
- **Long-term investment.** Changing organizational culture and integrating services to support caregivers and children simultaneously takes time. Grantees and experts in the field explained that long-term investment allows organizations to build the partnerships and systems necessary to implement a 2Gen approach.
- **Strong partnerships.** Most organizations don't provide all the services necessary to support all family needs, so strong collaboration with partner agencies is an important part of successful 2Gen implementation. Some grantees shared that providing honorariums to partner agencies can be useful, particularly when partnerships have reached the level of sharing data and tracking referrals, as this can involve significant time commitment. Since sharing data for measuring outcomes for both caregivers and children across agencies is difficult and necessary, investing in systems that facilitate data sharing can support effective implementation of 2Gen approaches across agencies.
- **Staff buy-in.** Some grantees explained that staff buy-in is an important component of implementing a 2Gen approach. Prioritizing buy-in early and at all levels of an organization can support successful 2Gen implementation and help shift organizational culture to center the family.

One reason this collaboration has worked is because it has been flexible enough.

—Grantee

Barriers to Implementation

- **Limited staff time.** Many employees in the nonprofit and human service sectors are already wearing multiple hats. Implementing a 2Gen approach may involve learning new systems, receiving additional training, and expanding intake and referral strategies—all of which require time. Grantees shared that limited staff time—which is generally a product of limited funding and not having sufficient staff to share the work—can be a barrier to implementation.
- **Limited funding.** Limited funding is a barrier to successful implementation of 2Gen approaches, which are often time- and resource-intensive. Grantees acknowledged these complex approaches require adequate funding to build partnerships, shift organizational culture, change practice, and implement new strategies.
- **Uncertainty around funding sustainability.** Grantees and experts in the field explained that uncertainty about funding plans is a barrier to implementation. Establishing a 2Gen approach requires significant planning, collaboration, and systems change; and uncertainty around timeline or funding sustainability can compromise efforts to implementation.
- **Structural or systemic barriers.** Grantees described several structural or systemic challenges that they encountered on their implementation journey. Examples include policies interfering with accessing care; difficulty with Medicaid reimbursement; stigma associated with certain services; and issues such as housing, transportation, or food insecurity that some organizations may not be able to address.

We didn't realize how difficult it is and how intensive it is to really, seriously serve a whole family.

—Grantee



Opportunities for 2Gen DIG Funding

There are many strengths to the Foundation’s DIG strategy, and grantees repeatedly expressed appreciation for its approach. A key theme that emerged across study activities is the need to balance a flexible funding approach with the ability to demonstrate improved caregiver, child, and family outcomes.

As grantees and other experts in the field shared, removing as many funding restrictions for grantees as possible can help agencies achieve policy and systems outcomes (Sims & Bogle, 2017). Yet there is also a need to rigorously measure individually caregiver, child, and family outcomes. Agencies that proactively use data for quality improvement are more likely to deliver effective services and best meet the needs of families (Sims & Mose, 2020). Funding can help support the measurement of outcomes and promote the use of data to inform practice.

This chapter provides recommendations to the Foundation and are informed by the study interviews and field assessment findings (see Exhibit 6 for a crosswalk of recommendations and findings). It identifies opportunities to revise the DIG funding strategy to help move grantees toward demonstrating whole family impacts, infrastructure supports to help grantees use data for quality improvement and deliver effective services, and strengths in the current strategy that may be strengthened or maintained.

Opportunities to Revise the DIG Strategy to Move Grantees Toward Demonstrating Whole Family Impacts

The recommendations described below are intended to standardize the use of data to inform practice and support effective implementation. While several grantees used funds to support third-party evaluations or evaluation-related practices,⁶ the current unrestricted funding approach means efforts are not uniform across the DIG portfolio. This limits the Foundation’s ability to assess the impact of its investment. These recommendations can be achieved in ways that align with the flexible funding strategy and, more importantly, can help awardees deliver high quality services that intentionally serve caregivers and children at the right intensity to reach meaningful outcomes for the family. The Foundation may add five strategies to the current DIG funding approach to help grantees

⁶ This study assessed the Foundation’s 2Gen DIG strategy as a whole and was not an assessment of each individual grantee approach.

use data for quality improvement, measurement of meaningful outcomes, and ultimately, help them move toward being able to demonstrate impacts for families.

Set aside funding for evaluation in every grant

Experts note the importance of embedding program quality improvement and evaluation to best serve families. Early research examining 2Gen approaches found few or no impacts for children and

The field is at an inflection point where there's an important need to demonstrate 'impact,' and leverage that for more public resources.

—Mosle & Sims (2024)

families (Sama-Miller et al., 2017); however, methodological and implementation issues, such as a lack of intentionally connecting services for both caregivers and children, may have limited findings (Chase-Lansdale & Brooke-Gunn, 2014). To address these methodological and implementation challenges, evaluations should examine how programs are implemented, how they integrate caregiver and child services, and the level of intensity (i.e., dosage, duration) of those services. Experts note the quality and intensity of services provided by 2Gen initiatives may need to be at high levels for programs to have an impact on caregiver and child outcomes and an intentional approach to serving both generations may

matter (Sama-Miller, 2017). Measuring these process indicators can strengthen implementation and identify opportunities for program improvements (e.g., using learnings to adjust service delivery and ensure programs are effectively meeting the needs of caregivers and children).

In addition to measuring process indicators to understand the quality and intensity of services, it is important for programs to measure caregiver and child outcomes to understand how services may be impacting families. A logic model is a powerful way for 2Gen initiatives to visually articulate

Data can help programs understand the quality and intensity of services. 2Gen initiatives should measure process indicators to examine how programs are implemented, how they integrate caregiver and child services, and the level of intensity of those services.

A **logic model** is a powerful way for 2Gen initiatives to visually articulate intended process indicators and outcomes. They can also be a starting point for programs to inform the selection of process indicators and outcome measures.

It can be tricky to give funders the numbers they want to see when it comes to family outcomes—especially given the timeframes. The trajectory of what we’re going for is over many years, not just 3 to 5. If it’s intergenerational, it’s at least 20 years.

—Ascend

intended process indicators that capture inputs (specifically measures related to program activities, services, and work performed), outputs (e.g., number of caregivers and children served, number of referrals, number of staff trainings), and their linkages to intended outcomes (e.g., increases in parenting and career skills, gains in caregiver educational attainment, improved school readiness of children, improved parent-child interactions). As programs change over time, logic models should be revisited regularly and updated to reflect these changes (Bartko et al., 2021). Logic models can be useful for programs to identify meaningful measures and to help understand what services help all families or different types of families. They can also be a starting point for programs to inform the selection of process indicators and outcome measures. DIG grantees all developed logic models and outcomes frameworks as part of the grant. Although all have a logic model,⁷ few seem to use them to inform data collection or assess the relationship between activities and outcomes. The Foundation has an opportunity to help all grantees use logic models to strengthen program implementation, data collection practices, and examine the

link between activities and intended outcomes. Programs should also disaggregate outcome data by race and ethnicity, gender, and other relevant characteristics of the communities served and identify disparities across different groups. If disparities are identified, programs may explore their underlying causes and can work to address those inequities.

A document review of grantee reports suggests all collect data and report to funders, though there is variability in what is being collected and how data are used. While data can be a powerful tool to help programs understand how caregiver and child services are integrated, the quality and intensity of those services, and the attainment of caregiver and child outcomes, grantees may face multiple barriers when trying to evaluate 2Gen initiatives. Programs may lack data systems or data sharing

⁷ All grantees developed logic models and outcomes frameworks as part of the grant.

mechanisms,⁸ internal evaluation staff or external research partners, or technical assistance (TA) to support building data capacity and data-informed decision making (Sama-Miller et al., 2017). Intentionally funding evaluations and quality improvement efforts as part of a grant allows organizations to allocate the time and resources needed to collect, analyze, and report data. Ensuring evaluation is a dedicated part of someone's role and protecting staff time to support evaluation activities helps organizations move toward a quality improvement mindset where data can inform decision making.

Not every organization has the resources to conduct a rigorous evaluation, but every organization should engage in some form of performance monitoring.

—Sims & Mosle (2020)

Also, evaluation designs should be appropriate for each grantee's stage of development. Experts note that impact evaluations should only be conducted on 2Gen initiatives that are collecting data on both caregiver and child outcomes and have already demonstrated successful implementation for several years. Otherwise, those evaluations may produce erroneous findings and do a disservice to the field overall (Sama-Miller et al., 2017). As such, the recommendation is not for the Foundation to fund a rigorous impact evaluation for every grantee, particularly those early in the implementation of a 2Gen approach and still working to integrate caregiver and child services at an appropriate level of intensity to address targeted outcomes. Yet, every organization should engage in some form of measurement and intentionally use data to understand program challenges, develop evidence-informed solutions, and enhance the effectiveness of 2Gen initiatives (Fung et al., 2022).

Include intensive, individualized TA for all grantees

Many programs struggle with developing the appropriate infrastructure to integrate caregiver and child services and to collect and integrate data on caregiver and child outcomes (The Annie E. Casey Foundation [Casey], 2017). Building intensive, one-on-one TA support around program design, evaluation, and quality improvement can be critical to helping grantees build their capacity around using data for program improvement.

All grantees collaborated with partners to varying extents—some are single multiservice organizations, some joint partnerships between two agencies, and others multiorganizational collaboratives. TA should consider the organizational structure of the initiative and how caregiver and child services and data are integrated across providers. While there is no “right” way to integrate services, the way in which a 2Gen initiative integrates caregiver and child services has implications

⁸ Many grantees have made progress in being able to track and measure outcomes, though this is not the case for all.

for how they might collect and share data (Casey, 2017). A TA approach should be tailored to the unique structure of each initiative by integrating services and taking into account what data are collected and shared. TA can help grantees find opportunities for sharing data across partner organizations to more holistically understand caregiver, child, and family outcomes. Data sharing is critical to understanding the extent to which services are integrated and to what extent the outcomes have been met. This can enhance service coordination and reduce the likelihood of duplication of services.

Most human service agencies do not have the capacity to accurately and consistently track process and outcome measures or to use data to inform implementation practices (Sama-Miller et al., 2017), so building one-on-one TA support for each grantee can help them build their capacity around using data for program improvement. Targeted TA, either through the Foundation or a third-party provider, can support grantees in developing and refining the logic model of their 2Gen initiative, help identify implementation challenges, and articulate pathways from activities to the intended short- and long-term outcomes. Access to these kinds of supports can help grantees identify the measures that are most meaningful for the programs and establish a data system or data sharing mechanisms to track caregiver and child outcomes.

Narrow the focus of the grantee portfolio and increase the investment in each grantee to examine the impact of a 2Gen approach

As previously noted, it is important to embed evaluation within grants and to build the organizational capacity to help ensure effective services for families. Grantees vary widely in the use of data to better understand and improve service delivery. Earlier recommendations suggested requiring grantee evaluations and providing TA directly to grantees to strengthen capacity to generate and use evidence to inform decision making. Doing so may improve the quality and effectiveness of those programs and can result in more impactful investments. To offset the costs of embedding evaluation and one-on-one TA to grantees, the Foundation may consider narrowing the focus of the grantee portfolio so the investment in each grantee can be deeper and more impactful than at present. Focusing on a specific outcome (or set of outcomes) or a specific sector could make this happen.

Data sharing across community partners is critical to understanding the outcomes associated with a 2Gen initiative.

Deepening the investment with **fewer grantees** can help the Foundation build evidence about 2Gen initiatives while also supporting grantees in providing high quality, effective services.

Deepening the investment with fewer grantees can help build evidence about 2Gen initiatives while also supporting grantees in providing high quality, effective services.

Review and revise reporting tools to ensure information collected minimizes grantee burden and helps the Foundation determine whether it is meeting its goals

As part of the unrestricted funding approach, grantees have flexibility in how they report activities, outputs, and outcomes. Although the Foundation requires them to submit certain process indicators (e.g., number of families served, demographics) in a standardized format, there is substantial variation in how they report outcomes. Reporting could be simplified by requiring grantees to report on standardized forms only what the Foundation specifically needs to understand progress toward achieving strategic goals. This would minimize grantee burden while also providing sufficient information to understand the impact of the DIG investment. The Foundation could provide a reporting template that includes clear instructions, requires minimal narrative, and is flexible enough to align with the grantee's self-identified process and outcome measure as reflected in their logic model. Given the variation in services provided across grantees, each template may be tailored to grantee's 2Gen approach and closely aligned with their logic model to ensure key process indicators and outcomes are prioritized.

Identify and communicate a long-term vision for the Foundation's 2Gen investment

The recommendation is for the Foundation to develop a strategic vision that includes specific goals that grantees can make progress toward with each multiyear funding cycle. Although long-term family outcomes can take generations to attain, the Foundation can identify short-term outcomes that are measurable, closely linked to the 2Gen guiding principles, and attainable within a 4- to 5-year funding cycle.

As part of the vision, the Foundation can support grantees in building evidence and identifying outcomes for both caregivers and children that are clearly linked to caregiver and child services. This can include a planning year to build a service delivery model that equally and intentionally delivers services to caregivers and children; identify process indicators and appropriate caregiver, child, and family outcomes; and work with system partners to coordinate and share data. Practitioners in the 2Gen field shared that they need funding and TA to build their infrastructure and expand their organizational capacity to use data to inform decision making, and ultimately improve their programs to effectively serve families (Mosle & Sims, 2024). Funding grantees to build and strengthen their infrastructure and allowing the time needed to put new processes in place promotes sustainability and can strengthen the quality and effectiveness of services.

Once the Foundation develops a strategic plan for how to move forward, articulate it to partners and potential partners. For example, does the Foundation want to grow its portfolio and fund more grantees, or deepen its impact with fewer grantees? What does deepening the impact with fewer grantees mean? How can this new funding approach benefit grantees and better service communities? Communicating a long-term plan to grantees can help them plan for sustainability and understand how a deeper investment can result in a deeper impact within their community.

The Foundation can support grantees in **building evidence** and identifying outcomes that are clearly linked to caregiver and child services.

Aspects of the Current DIG Strategy to Continue

This section identifies strengths in the current DIG strategy that align with best practices in the field. Below are suggestions for opportunities to strengthen or maintain aspects of the current funding strategy.

Continue flexible funding in multiyear grants

Experts in the field highlight the importance of flexible funding over a multiyear funding cycle. For example, funders participating in Ascend's 2Gen Building Evidence Learning Action Community noted the need to increase investments by including longer project periods with funding that includes connections to resources and TA to support program development and measurement (Mosle & Sims, 2024). The Foundation can maintain flexibility in how grantees use funds (e.g., how they fund partnerships, service delivery, staff trainings) while also ensuring necessary supports are in place to further quality improvement and sustainability. This flexibility in how funds are used can help ensure programs are tailored to community needs and support the organizational capacity for effective services. Also, continuing to invest in communities through multiyear grants allows organizations to implement sustainable practices.

Continue to support the inclusion of family voice in the work

Grantees emphasized the importance of family feedback in their 2Gen approach. Incorporating family voice helps ensure services support the goals and needs of clients and align with best practices. Authentically engaging current and former clients in decision making and integrating their feedback is consistent with the Foundation's equity principles and can help ensure program decisions are inclusive of those impacted directly from services. Family engagement falls along a

continuum (Child Trends & James Bell Associates, 2018) and presently grantees are on the spectrum of meaningful engagement. Funding family engagement as part of the DIG strategy can ensure grantees allocate time and funds to support family engagement opportunities in their budgets and can help move them further along the continuum of engagement. It also ensures clients are appropriately compensated for their expertise. In addition to intentionally funding family engagement as part of every grant, the Foundation can continue to share resources and foster peer learning opportunities.

Continue to support and strengthen systems coordination and multisector collaboration

Strong, multisector partnerships are critical to delivering integrated services to caregivers and children and providing wraparound supports. While intentional and effective collaboration can result in more streamlined and holistic services than siloed provision, it can be challenging to attain. Organizations taking the lead in coordinating 2Gen services for families assume an added burden of ensuring a true integration of services and attainment of caregiver, child, and family outcomes (Mosle & Sims, 2016). Case studies of 2Gen collaboratives identified several challenges in collaborating across providers, including limited knowledge about the services available among staff across organizations, unclear processes for helping families access services, and lack of systemic process for tracking referrals (Fung & Sama-Miller, 2022). These challenges were exacerbated by the ongoing COVID-19 pandemic. Experts note these challenges in collaboration can lead to low staff frustration, missed opportunities to support families, and delayed progress in attaining outcomes for families (Fung & Sama-Miller, 2022).

To mitigate these common challenges, the Foundation may continue to support strong partnerships that allow organizations to align and link services. Recognizing that the grantee organization (or multiple organizations in cases of shared partnership) must assume an added burden, future grants should support grantees in developing a plan for partnership and allocating sufficient funds and staff time to support successful partnerships. To this end, grantees can also use tools to measure collaboration (e.g., The Wilder Collaboration Factors Inventory⁹) and use findings to test strategies that can strengthen collaboration, and ultimately result in more effective services for families.

⁹ The Wilder Collaboration Factors Inventory is a free tool to help organizations assess the strengths and limitations of collaboration across research-tested success factors. See <https://www.wilder.org/wilder-research/research-library/collaboration-factors-inventory-3rd-edition>.

Continue the field-building work the Foundation is doing to connect grantees to resources and to each other

The past decade has been a time of significant change for the field, including new policies that support 2Gen efforts and increased public funding of 2Gen approaches. For example, the Kansas Department for Children and Families launched a 2Gen Kansas program in 2024 and the Ascend Fellows currently steward \$31 billion in public funding for children and families. Several grantees also spoke of their commitment to field building and shifting policy initiatives to support more public funding of 2Gen efforts. Private funders, including philanthropic organizations like the Foundation, are often nimble enough to move strategically, test innovative approaches, and build evidence in ways government programs cannot (Janus, 2024). The Foundation's investment in field-building through its support to Ascend and the Literacy Cooperative of Cleveland have helped grow the field and strengthen the capacity of 2Gen providers. These investments have helped to connect grantees with resources, offer learning opportunities, and build organizational capacity to implement services.

Conclusions

The Foundation has made substantial contributions to the 2Gen field through its partnership with grantees and its support of field building efforts. The 2Gen DIG strategy has contributed to many positive changes at organizational and system levels, which grantees and clients link to positive outcomes for families. Additionally, its contribution to field building has supported large policy- and practice-change efforts at the national level and within the Foundation's grantee communities. The past decade has been a time of significant change, including new policies that support 2Gen efforts and increased public funding of 2Gen approaches. The Foundation's investment coincides with a period of rapid field expansion and is an example of how smaller family foundations can contribute to a larger, collective movement that shapes policy, laws, and practices.

Exhibit 6. Crosswalk of recommendations and findings

Recommendation	Data source(s) informing recommendation
Set aside funding for evaluation in every grant	Document review, grantee interviews, field assessment
Include intensive, individualized TA for all grantees	Field assessment
Narrow the focus of the grantee portfolio and increase the investment in each grantee to examine the impact of a 2Gen approach	Based on assumed cost of implementing prior recommendations
Review and revise reporting tools to ensure information collected minimizes grantee burden and helps the Foundation determine whether it is meeting its goals	Grantee interviews, field assessment
Identify and communicate a long-term vision for the Foundation’s 2Gen investment	Grantee interviews
Continue flexible funding in multiyear grants	Grantee interviews
Continue to support the inclusion of family voice in the work	Grantee interviews
Continue to support and strengthen systems coordination and multisector collaboration	Document review, questionnaire, grantee interviews
Continue the field-building work the Foundation is doing to connect grantees to resources and to each other	Field assessment, grantee interviews

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Appendix A. Methods

This section provides an overview of the study design methods. It identifies the data collection procedures for the study and how data was used to answer the key study questions.

Data Collection Overview

The study team used data from multiple sources to answer the study questions. Data collection included document reviews, a questionnaire administered to DIG grantees, interviews with grantees and clients, interviews with Foundation staff, and a targeted field assessment using the methods outlined below. See Exhibit A-1 for more details.

Exhibit A-1. Data Collection Crosswalk

Data collection method	Data source	Themes captured in data collection	Sample
What is the perceived impact of a 2Gen approach on families?			
Document review	Grantee materials (e.g., proposals, progress reports)	<ul style="list-style-type: none"> • What were grantee goals and their desired caregiver, child, and family-level outcomes? • What services or activities did grantees implement as part of their 2Gen approach? • What child, adult, and family-level outcomes did grantees report and how did these change over time? 	Proposals, progress reports, and data from 18 grantees
Questionnaire	Grantees	<ul style="list-style-type: none"> • What are characteristics of the grantee organization in terms of service sector, size, number families served, and services offered? 	18 grantees
Interviews	Grantees	<ul style="list-style-type: none"> • How do grantees perceive the impact of their 2Gen approach on families? • Do grantees feel they were able to meet their goals and desired family-level outcomes? 	18 grantees
Interviews	Clients	<ul style="list-style-type: none"> • How do families describe the services they received? • What was their experience with services provided by the grantee? • What were families' goals and their desired caregiver, child, and family outcomes? • How do families perceive the impact of grantee-provided services on their goals and desired outcomes? • Do families associate grantee services with changes in their life circumstances? 	9 clients from 7 grantee agencies (1–2 program representatives per grantee)

Data collection method	Data source	Themes captured in data collection	Sample
What is the perceived impact of 2Gen DIG funding on organizations, systems, and policy?			
Document review	Foundation documents	<ul style="list-style-type: none"> What is the Foundation's intended impact of DIG funding? What guidance does the Foundation provide to grantees regarding implementation of a 2Gen approach? 	Foundation documents
Document review	Grantee materials (e.g., progress reports)	<ul style="list-style-type: none"> What were grantee goals and their desired organization- and system-level outcomes? What has changed at grantee agencies as a result of receiving DIG funding? 	18 sets of grantee material
Interviews	Grantees	<ul style="list-style-type: none"> What were grantee goals and their desired organization- and system-level outcomes? What has changed at grantee agencies as a result of receiving DIG funding? Do grantees feel they were able to meet their goals and desired organization- and system-level outcomes? Have grantees contributed to or experienced related policy-level changes as a result of DIG funding? What are grantee perceptions of organization-, system-, and policy-level impact? 	18 grantees
What are the facilitators and barriers to implementing 2Gen best practices?			
Field assessment	Web search (includes follow-up communications with target groups)	<ul style="list-style-type: none"> What are 2Gen best practices? What are known facilitators and barriers to implementing a 2Gen approach? 	N/A

Data collection method	Data source	Themes captured in data collection	Sample
Interviews	Foundation staff	<ul style="list-style-type: none"> • How does the Foundation define 2Gen best practices? • What barriers has the Foundation experienced when supporting grantees implementing a 2Gen approach? • What barriers to implementing a 2Gen approach has the Foundation observed at grantees' agencies? • What factors have helped the Foundation as they support grantees implementing a 2Gen approach? • What factors does the Foundation think facilitate successful implementation of a 2Gen approach? 	
Interviews	Grantees	<ul style="list-style-type: none"> • How do grantees define 2Gen best practices? • What barriers did grantees face when implementing their 2Gen approach? • What factors helped facilitate successful implementation of a 2Gen approach? 	18 grantees

Document Reviews

Prior to the interviews with grantees and families, the study team reviewed DIG materials shared by the Foundation. Materials include documents from grantees, such as grant proposals, progress reports, and third-party evaluations of grantee programs (when available) and materials from the Foundation, such as guidance provided to grantees, information about the DIG program and activities, and summary data files.

The purpose of reviewing these materials was to understand and document the (1) 2Gen approach implemented by each grantee; (2) intended program outcomes, as identified by the Foundation and grantees; (3) the degree to which these outcomes were attained; and (4) factors that affected outcome attainment. The study team extracted relevant information from Foundation and grantee materials to identify themes across grantees and inform subsequent data collection protocols.

Grantee Questionnaire

The study team used a short 15-minute questionnaire to supplement the document reviews. The questionnaire collected information about grantee organization characteristics (see Appendix B). This was used to characterize each grantee by service section, size, number of families served, services offered, a description of the 2Gen services offered, and how the grantee uses funds for services.

Interviews

Grantee interviews. The study team completed 18 semistructured virtual interviews with staff knowledgeable about the 2Gen services implemented by their agency. The purpose was to understand and document (1) how grantees define success; (2) what grantees identify as 2Gen best practices; (3) what factors enhance or hinder implementation of best practices; (4) how grantees used funds, including innovative approaches to service delivery; and (5) grantee perceptions of 2Gen DIG funding's impact on organizational policies, systems, and program sustainability. (See Appendix C.)

The study team reached out to all grantees receiving funding ($n = 18$ grantees) using contact information provided by the Foundation. One or two grantee representatives were invited to participate. Participation did not affect funding. A short information document helped grantees identify which staff members would be best suited to participate in the interview and provided a list of topics that may be addressed. Staff were asked to share the questions with other staff or with partners to incorporate multiple perspectives. Interviews were approximately 60 minutes. See page 40 for better language.

Semistructured interviews allow for the collection of information across a consistent set of questions and concepts and for additional discussion of issues that may emerge. The semistructured interviews used a mix of closed- and open-ended questions.

Interview protocols were tailored to the participants. For example, although similar lines of questioning were asked of all grantees, specific questions were tailored and based on information gathered during the document reviews. Additionally, each interview allowed for a few minutes to discuss the process of identifying and recruiting clients for participation in the study (see selection criteria in Exhibit A-2). The selection criteria were used to minimize bias in which clients are nominated for interviews (e.g., only interviewing clients who have attained specific outcomes), limitations in this approach (e.g., only reaching out to clients who are interested and accessible) were acknowledged. Each grantee provided feedback about how best to connect with clients served at their organization and which clients received services that align with the 2Gen approach.

Exhibit A-2. Grantee Selection Criteria for Family Interviews

Selection criteria	Parameters	Notes
Grantee selection process		
Length of participation	Clients who are/were enrolled for at least the median length of services at the grantee agency	To ensure clients nominated for interviews had been involved in the program long enough to provide feedback on outcomes and outcome attainment and recognizing grantees differ in service delivery characteristics, we asked each to consider the median length of services at their agency and only nominate clients who have been enrolled for that length of time or greater.
Recency of services	Received services within the last 3 months	To increase the likelihood clients no longer enrolled can recall experiences with program services, we asked grantees to exclude clients who have not received services for greater than 3 months.
Permission to share contact information with study team	Clients provided consent to share contact information with study team	Before nominating for an interview, the grantee representative reached out to the client and requested permission to share contact information with the study team. The study team provided grantees with talking points to support this request. If the client provided permission to share contact information and was selected for an interview, the study team obtained additional consent to participate.

Selection criteria	Parameters	Notes
Study team selection process		
Random selection of nominated clients	Select 1–2 representatives per grantee	Once the grantee provided a list of potential clients, the study team randomly selected 1–2 names to invite to participate in an interview. If the client declined or the study team had made at least three unsuccessful attempts to reach the client, another name from the list was randomly selected.
Service delivery type representation	Ensure diversity of grantee service delivery type is represented in the sample	When selecting 1–2 clients per grantee for interviews, consideration was given to the overall sample to ensure a good mix of the different service delivery types were represented.

Family member interviews. The study team completed nine semistructured virtual interviews with clients who had recently received services supported by DIG funding. The purpose was to understand and document the (1) family experiences with services provided by the grantee, (2) family goals and desired outcomes, and (3) family perceptions of the impact of these services on their goals and desired outcomes (see Appendix D).

The study team reached out to clients using the selection criteria identified in Exhibit A-2 and invited them to participate in an individual or group interview (up to three clients per grantee). Participation was voluntary and clients received a \$25 gift card or \$25 cash payment upon completion of the interview. A short information document provided help to the clients to prepare for the interview and to understand the types of questions that would be asked. Interviews lasted approximately 45 minutes.

As with the grantee interviews, a semistructured approach was used to conduct family member interviews, which included a mix of closed- and open-ended questions.

Interview protocols were tailored to each client. For example, although similar lines of questioning were asked of all clients, specific questions were tailored and based on the program from which the client received services and the kinds of services provided.

Data Collection Processes

Interviews

A team of four conducted the interviews. Each team member had experience conducting structured and semistructured interviews.

Before interviews began, the interviewers received a training that covered general interview guidelines, tips on conducting successful interviews, and the specific interview protocols. The training also addressed logistics of scheduling, recording instructions, pretasks (e.g., reviewing supporting materials and all protocols), post tasks (e.g. saving recordings¹⁰ to the secured drive), and obtaining consent.

All interviews were conducted virtually using Zoom. With the permission of the participants, they were audio recorded using Zoom so complete and accurate responses could be captured. After the interview was completed, recordings were downloaded and saved to a secure drive. Electronic audio files were uploaded to Speechpad for transcription. Once transcribed and the transcription deidentified, audio files were destroyed.

James Bell Associates (JBA) also completed internal pilot testing of the interview protocols using 1–2 JBA staff members who were not part of the study team. These staff members took on the role of a grantee or client to assess if questions were confusing or unclear and to monitor the time. Where necessary, minor modifications (such as changes to word choice or additional examples) were made. Higher or lower priority was assigned to particular interview questions to ensure the essential ones were covered. Throughout data collection, the study team held weekly check-in calls with all interviewers to see how questions were working and if any modifications were necessary.

The process used to schedule interviews is outlined below. Except where noted, the study team followed the same procedure for both grantee and family member interviews. However, the team did not reach out to clients to recruit for family member interviews until the respective grantee interview was complete and permission was received from clients to share contact information with JBA.

1. The assigned interviewer sent an email invitation to the grantees asking them to participate in an interview.
2. The assigned interviewer worked directly with the grantee to identify which staff should participate, schedule the interview, confirm the interviewee(s), and obtain necessary contact information. The interviewer sent the grantee an overview of the study and discussion topics (see Appendix E) to assure appropriate staff participate and help the grantee prepare. The interviewer communicated that up to a total of two staff members could participate in the interview.
3. Within 1 week of scheduling, the assigned interviewer sent all interviewees an email with the call-in information, a copy of the topics and example subtopics, and a copy of the Informed Consent Form (see Appendix G). The interviewer also confirmed that the interview can be

¹⁰ Recordings were initially saved on a secured drive, so they could be sent for transcription and were destroyed after transcripts were deidentified.

recorded. They also sent an Outlook calendar invitation with call-in information (interview participants were also offered the opportunity to join the call through video using Zoom).

4. Within 2 days after completing the interview, the assigned interviewer sent a thank you email to the interviewee(s). The interviewer also confirmed the process for identifying participants for the family member/client interviews.
5. The study team followed the same steps to reach out to identified clients, however, identified clients were not contacted until the respective grantee interview was complete (see Appendices F and H).

Study Recruitment and Data Collection Timeline

The recruitment and data collection timeline is shown in Exhibit A-3. Institutional Review Board (IRB) approval was obtained in December 2023. All study activities were completed by July 2024.

The timeframes stretched over multiple months to account for several factors, such as challenges and delays scheduling and rescheduling interviews, respondents cancelling or not showing up, and time needed to follow up with interview respondents as needed. The timeframe for interviewer training occurred over a 1-month period to provide time for initial and follow-up training with all interviewers as well as time to complete practice interviews and provide additional group and individual support and guidance before interviews began. The process of reaching out to schedule and complete family interviews spanned multiple months since these processes were initiated on a rolling basis and were contingent upon completion of respective grantee interviews.

Exhibit A-3. Study Recruitment Data Collection Timeline

Activity	2023			2024							
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Submit IRB											
Receive IRB approval											
Outreach to grantees											
Grantees receive email to schedule interviews, list of interview topics; email confirming scheduled interview; informed consent form; outlook calendar invite											
Train interviewers											
Complete grantee interviews, send thank you emails, follow up on client recommended for family member interviews											
Grantees receive thank you email and request for program participant recommendations for family member interview											
Outreach to selected clients											
Clients receive email to schedule interviews, list of interview topics; email confirming scheduled interview; informed consent form; outlook calendar invite											
Complete family member interviews, send thank you emails, send e-gift card or cash payment											
Clients receive thank you email, e-gift card or cash payment											

Appendix B. Grantee Questionnaire

Thank you for your interest in completing this short, 15-minute questionnaire! We are inviting grantee representatives to complete this short survey in advance of the interview to allow for more in-depth conversation during the interview. Questions are primarily multiple choice, and your responses will help us develop a better understanding of some aspects of your agency and its 2Gen approach. We will follow up on some of these questions during the interview.

If you agree to complete the questionnaire, please click on “Next” below.

1. Please select your program/agency from the list below.
 - a. Center for Urban Families
 - b. Community of Hope
 - c. Cuyahoga Community College
 - d. Educational Alliance
 - e. Enterprise Community Partners
 - f. Friends of the Future
 - g. Literacy Partners
 - h. Mamatoto Village
 - i. Mercy Center
 - j. MetroHealth Foundation
 - k. Rutland Parent Child Center
 - l. Sisters of Charity Foundation
 - m. The Centers
 - n. The Child Center of NY
 - o. Towards Employment
 - p. United Way of Central Maryland
 - q. United Hospital Fund
 - r. University Hospitals
 - s. Other (please describe): _____
2. What is your role at the agency?
3. How many full-time staff are employed at your agency?
4. How many part-time staff are employed at your agency?
5. How many programs/services are offered at your agency?

6. What is your best guess about the total number of parents/caregivers currently receiving services at your agency?
7. What is your best guess about the number of children currently receiving services at your agency?
8. Which of the following services does your agency provide? Please select all that apply.
 - a. Early childhood education
 - b. Childcare/day care
 - c. Parenting groups
 - d. Home visiting
 - e. Health care services
 - f. Mental health services
 - g. Substance use/dependency-related services
 - h. Adult education or employment services
 - i. Transportation services
 - j. Food assistance-related services
 - k. Other direct assistance services
 - l. Other (please describe): _____
9. How long has your agency been implementing a 2Gen approach to serving families?
 - a. Less than 1 year
 - b. 1–2 years
 - c. 3–5 years
 - d. More than 5 years
10. What is your best guess about the number of parents/caregivers currently receiving 2Gen services at your agency?
11. What is your best guess about the number of children currently receiving 2Gen services at your agency?
12. In which sectors do you offer 2Gen services? Please select all that apply.
 - a. Healthcare
 - b. Education
 - c. Workforce development/employment
 - d. Human services
 - e. Other (please describe): _____
13. How have you used the William J. and Dorothy K. O’Neill Foundation’s 2Gen Deep Impact Grantmaking funding? Please select all that apply.
 - a. Implemented new program or service
 - b. Expanded existing program or service
 - c. Hired new staff member(s)

- d. Hired contractor/consultant
- e. Hired external evaluator
- f. Provided direct assistance to families
- g. Purchased office or program supplies
- h. Purchased data-management software or services
- i. Established partnership(s) with other agencies
- j. Other (please describe): _____

14. Which of the following describes your agency's 2Gen approach to service coordination and referrals? Please select all that apply.

- a. We are working to break down silos within our own agency.
- b. We are building partnerships with other agencies.
- c. Other (please describe): _____
- d. Not applicable (please describe): _____

Appendix C. Interview Protocol

– Grantees

Thank you for taking the time to speak with me today! My name is [name] and I am a [role] with James Bell Associates, a research and evaluation firm. The William J. and Dorothy K. O’Neill Foundation (Foundation) has hired James Bell Associates to conduct an evaluation of the Foundation’s 2Gen Deep Impact Grantmaking Program. As part of this process, JBA is speaking with each grantee to learn more about their experience with the 2Gen Deep Impact Grantmaking program and perceptions of how a 2Gen approach supports caregivers, children, and families.

Specifically, we are interested in learning about:

- Your experience with the 2Gen Deep Impact Grantmaking program
- How you have used 2Gen Deep Impact Grantmaking funds at your agency
- What a 2Gen approach means to you and how you feel about the 2Gen approach at your agency

The information you share will expand the field’s understanding of how to use a 2Gen approach to serve families and will also inform the Foundation’s approach to future funding. All information you share will be completely confidential. Findings from the interviews may be shared, but your identity will not be disclosed.

This interview is voluntary, and you may end your participation at any time by asking to stop the interview. You may also skip any question you do not wish to answer. Your decision to participate or not participate will not result in any penalty or loss of funding. Likewise, your responses themselves will have no positive or negative impact.

By verbally agreeing to complete the interview, you give your consent to join this study. You should not join this study until all of your questions are answered. Do you have any questions for me?

If you have any questions or complaints about this interview, please contact Susan Zaid, Project Director. We included her contact information on the information sheet and consent form we sent before this call.

Do you agree to participate in this interview?

[If interviewee did not previously indicate they do not want to be recorded.] I was hoping to be able to record this interview, so that I can be more attentive to your responses to the questions and accurately capture your responses. Once we transcribe the recording, it will be destroyed. May I have your permission to record this interview? [If yes, press *7 or click Record button in Zoom]

[If interviewee has agreed to participate in the interview and has agreed to have the interview recorded, start the recording [press *7 or click Record button in Zoom]. If there is more than one participant on the phone, ask each participant to state their name and title so that the transcribers can differentiate the respondents' voices.]

[If interviewee has agreed to participate and to have note taker participate but does not agree to have the interview recorded, start the interview. If there is more than one participant on the phone, ask each participant to state their name and title so that the notetaker can differentiate the respondents' voices.]

[If interviewee previously indicated they do not want to be recorded.] Before we begin, I wanted to note that my colleague (name of notetaker) is also on the call today to take notes so I can concentrate on our discussion. Is this okay with you?

[If interviewee has agreed to participate and previously agreed to having the call recorded but now does not agree to recording the call, tell the interviewee that you will need to reschedule the call for a time when you can have a note taker participate in the call.]

1. How did your agency learn about the William J. and Dorothy K. O'Neill Foundation's 2Gen Deep Impact Grantmaking program?
 - a. How was this funding described to you?
2. Could you tell us more about how you have used the Foundation's 2Gen Deep Impact Grantmaking funding? We see that you [refer to questionnaire and grantee spreadsheet]. We'd like to learn more about that.
3. What has changed as a result of receiving funding from the William J. and Dorothy K. O'Neill Foundation?
 - a. What has changed at the system level? This includes community or state context, policies, etc.
 - b. What has changed at [grantee agency]? This includes organizational policies and procedures, external partnerships, staffing, etc.
 - c. What has changed at the family level? This includes what families have access to and any information you have about changes within families.
4. We'd like to learn more about your agency's 2Gen approach.
 - a. What does a "2Gen approach" to serving families mean to your agency?
 - b. How do families learn about your 2Gen services? Do other agencies refer families to you? Do you conduct outreach to families?
 - c. What happens when a parent/caregiver or family member first comes to your agency? How do you make decisions about who gets what services and how referrals are made?
 - d. If a parent/caregiver is requesting support for him or herself, how are decisions made about integrating services for children? How does your agency integrate services to support the whole family?
5. Could you tell us a bit about the clients your 2Gen programs serve?
 - a. Who participates in your 2Gen programs?
 - b. How long do families receiving services as part of [grantee agency's] 2Gen approach generally stay enrolled? Is there an "average" dosage or length of service?
6. What has worked well as you have implemented or expanded a 2Gen approach to serving families?
7. What challenges have you encountered as you have implemented or expanded a 2Gen approach to serving families?
8. Do you feel like your agency has developed new or innovative ways of implementing a 2Gen approach that could help inform related work at other organizations? If yes, could you describe these?
9. What do you think are some "best practices" when it comes to implementing a 2Gen approach?
 - a. Which of these best practices do you think your agency has been able to implement?

- b. What has helped make that happen?
10. Do you feel like the 2Gen approach works? Do you think there are better ways to support families?
 11. How do you feel about receiving flexible funding to support an approach, as opposed to specific services?
 12. What information or guidance have you received from the William J. and Dorothy K. O’Neill Foundation about how to implement a 2Gen approach at your agency?
 - a. How have you used this information or guidance?
 13. Could you tell us a bit about any webinars, learning communities, or other learning opportunities that have been facilitated by the William J. and Dorothy K. O’Neill Foundation?
 - a. Have you participated in any of these opportunities? If yes, how have they influenced your work?
 14. What do you think have been the most helpful components of the 2Gen Deep Impact Grantmaking program? What have been the least helpful?
 15. Do you have suggestions about how to improve the 2Gen Deep Impact Grantmaking program?
 16. Is there anything else you would like to share about your agency’s experience as a grantee with The William J. and Dorothy K. O’Neill Foundation’s 2Gen Deep Impact Grantmaking Program?

Appendix D. Interview Protocol – Family Member

Thank you for taking the time to speak with us today! We are [name] and [name], and we work with James Bell Associates. We sent an information sheet and consent form in advance, but before we begin, we would like to share a bit more about what we will be doing today.

The purpose of today's call is to learn about your experiences with [grantee] and your hopes for you and your family. We will ask some questions about the programs or services you participate in and whether you feel that these services or programs have helped you and your family meet your goals.

[Grantee] has received funding from the William J. and Dorothy K. O'Neill Foundation, and the Foundation hired James Bell Associates to learn more about what is important to families and how families are experiencing programs and services. The information you share today will help inform future funding and program decisions.

Your participation in today's call is voluntary, and you may end the call at any time. The information you share today will be kept private, and we will not share your name or other information with [grantee] or anyone else. We have set up this Zoom call in a way that your names are not visible to other participants. You will be able to share information anonymously, either through the chat feature or by talking. If you already have relationships with other participants you may recognize someone's voice, but we ask that you do not share anything you hear today with anyone outside this group. We hope everyone will feel comfortable sharing.

We are speaking with families from other parts of the country as part of this project and will use the information from 18 group interviews to help us understand more about family experiences. We may share some information that we learn from the group interviews with all participants, but we will never share names or any other information that could be used to identify you.

If you choose to participate in this 60-minute phone call, you will receive a \$25 gift card.

By agreeing to complete the interview, you give your consent to join this study. You should not join this study until all your questions are answered. Do you have any questions for me?

If you have any questions or complaints about this interview, please contact Susan Zaid, Project Director. We included her contact information on the information sheet we provided before this call.

Do you agree to participate in this interview? You can respond in the chat or over the phone.

1. Could you tell us a little bit about your experience with [grantee] (e.g., what do they do, what do you do)?
 - a. How long have you been involved with [grantee]?
 - b. What do you like most about [grantee]? What do you like least?
2. How are your children involved with [grantee]?
 - a. What do you think your children like most about [grantee]? What do you think they like least?
3. What did you hope might happen for you or your family as a result of being connected with [grantee]? How would you define “success”?
4. Do you feel that [grantee] has helped make that happen?
 - a. If yes, could you share a bit about what you think helped?
 - b. If no, could you share a bit about why?
5. Does anyone at [grantee] ask how you feel about the programs or services you have been part of? Do you have opportunities to provide feedback about what you like or don’t like?
6. Do you feel like [grantee] treats you and your family with respect?
7. If you could change anything about [grantee], what would you change?
8. How would you describe your dreams for you and your family at this point?
9. What do you think would help make those dreams a reality?

Appendix E. 2Gen Project Overview – Grantees

The William J. and Dorothy K. O'Neill Foundation (Foundation) has hired James Bell Associates (JBA) to assess the its 2Gen strategy and Deep Impact Grantmaking (DIG) program. As part of this process, JBA is speaking with each grantee, as well as family representatives from each grantee agency, to learn more about their experiences.

Project Goals

The goals of this project are to—

- Learn about grantee and family experiences.
- Understand perceived impact of 2Gen strategies and the Foundation's 2Gen DIG program.
- Identify and recommend future directions for the Foundation's 2Gen DIG program.
- Share findings with the Foundation, grantees, and families.

Project Activities

JBA will collect information from multiple sources to meet project goals. First, JBA will review Foundation documents and speak with Foundation staff and family members. JBA will then share a short questionnaire with grantees, conduct interviews with grantee staff, and hold group interviews with family representatives from each grantee agency. Once interviews are complete, JBA will analyze data and review literature from the field before preparing final recommendations and deliverables.

Grantee Participation

As a grantee, we want to learn from you! Grantee representatives are invited to participate in an interview, as well as complete a short questionnaire in advance. During the interview, JBA will ask some questions about your experience with the 2Gen DIG program: how you have used 2Gen DIG funds at your agency, what a 2Gen approach means to you, and how you feel about the approach at your agency. Participation is voluntary .

Contact Information

Please contact the Project Director, Susan Zaid, with any questions at— Susan Zaid, M.A., szaid@jbassoc.com, (703) 842-0949

Appendix F. 2Gen Project Overview – Families

The William J. and Dorothy K. O'Neill Foundation (Foundation) has hired James Bell Associates (JBA) to assess its 2Gen strategy and Deep Impact Grantmaking (DIG) program. As part of this process, JBA is speaking with each grantee, as well as family representatives from each grantee agency, to learn more about their experiences.

Project Goals

The goals of this project are to—

- Learn about grantee and family experiences.
- Understand perceived impact of 2Gen strategies and the Foundation's 2Gen DIG program.
- Identify and recommend future directions for the Foundation's 2Gen DIG program.
- Share findings with the Foundation, grantees, and families.

Project Activities

JBA will collect information from multiple sources to meet project goals. First, JBA will review Foundation documents and speak with Foundation staff and family members. JBA will then share a short questionnaire with grantees, conduct interviews with grantee staff, and hold group interviews with family representatives from each grantee agency. Once interviews are complete, JBA will analyze data and review literature from the field before preparing final recommendations and deliverables.

Family Representative Participation

As a client at one of the grantee agencies, we want to learn from you! Family representatives are invited to join a call with two or three other family representatives. JBA will ask some questions about the programs or services you participate in and whether you feel that these services or programs have helped you and your family meet your goals. Participation in the call is voluntary.

Contact Information

Please contact the Project Director, Susan Zaid, with any questions at—
Susan Zaid, M.A.
szaid@jbassoc.com, (703) 842-0949

Appendix G. Consent Form – Grantee

The William J. and Dorothy K. O'Neill Foundation (Foundation) has hired James Bell Associates to conduct an evaluation of its 2Gen Deep Impact Grantmaking Program. As part of this process, JBA is speaking with each grantee to learn more about their experience with the 2Gen Deep Impact Grantmaking program and perceptions of how a 2Gen approach supports caregivers, children, and families.

Specifically, we are interested in learning about—

- Your experience with the 2Gen Deep Impact Grantmaking program
- How you have used 2Gen Deep Impact Grantmaking funds at your agency
- What a 2Gen approach means to you and how you feel about the 2Gen approach at your agency

The information you share will expand the field's understanding of how to use a 2Gen approach to serve families and will also inform the William J. and Dorothy K. O'Neill Foundation's approach to future funding. All information you share will be completely confidential. Only the project team will have access to this information. Responses to the interview will be combined with responses from all grantee interviews, and only overall findings will be included in the final report and related memos. Your identify will not be disclosed and information will be presented in a way that does not identify you.

This 60-minute interview is voluntary. Your decision to participate or not participate will not result in any penalty or loss of funding. Likewise, your responses will have no positive or negative impact on you or the funding.

There are no foreseeable risks involved in participating in this project beyond those experienced in everyday life. There are no direct benefits to you for participating; however, the information you provide about your experience may provide valuable information to help ensure future funding approaches and programs meet grantee and family needs.

If you have any questions or concerns about this project, please contact Susan Zaid, Project Director at—

Susan Zaid, M.A.
James Bell Associates
2000 15th Street North, Suite 100
Arlington, VA 22201
szaid@jbassoc.com
(703) 842-0949

Appendix H. Informed Consent Form – Family

The William J. and Dorothy K. O'Neill Foundation has hired James Bell Associates to assess its 2Gen Deep Impact Grantmaking Program. As part of this process, JBA is speaking with family representatives from each grantee agency to learn more about what is important to families and how families are experiencing programs and services.

The 60-minute interview is voluntary and you are not required to participate. Your decision to participate or not participate will not result in any penalty. Likewise, your responses themselves will have no positive or negative impact.

There are no foreseeable risks involved in participating in this project beyond those experienced in everyday life. There are no direct benefits to you for participating; however, the information you provide about your experience may provide valuable information to help ensure future funding approaches and programs meet family needs.

All information you share will be completely confidential, and we will not share your name or other information. Only the project team will have access to this information. We are speaking with family representatives from 18 programs as part of this project, and information shared during the interview will be combined with information from all the other interviews. Only overall findings will be included in the final report and related documents. Your identify will not be disclosed and all information will be presented in a way that does not identify you.

As a token of appreciation for your participation, the study will provide you with a \$25 e-gift card following the interview.

If you have any questions or concerns about this project, please contact Susan Zaid, Project Director at—

Susan Zaid, M.A.
James Bell Associates
2000 15th Street North, Suite 100
Arlington, VA 22201
szaid@jbassoc.com
(703) 842-0949

Appendix I. Grantee Profiles

Center for Urban Families



4 years

partnering with O'Neill. Received implementation grant.



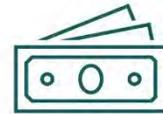
2 sectors

offering 2Gen services in workforce development/employment and human services.



3 service areas

serving families through parenting groups, adult education or employment services, and other direct services.



O'Neill funds

expanded existing programs or services and established partnerships with other agencies.

The Child Center of New York



2 years

partnering with O'Neill. Received planning and implementation grants.



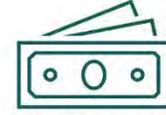
1 sector

offering 2Gen services in human services.



9 service areas

servicing families through early childhood education, childcare/daycare, parenting groups, home visiting, health care, mental health services, substance use/dependency-related services, adult education or employment services, and other direct assistance services.



O'Neill funds

implemented new program or service.

Community of Hope



3 years

partnering with O'Neill. Received implementation grant.



2 sectors

offering 2Gen services in healthcare and human services.



5 service areas

servicing families through parenting groups, home visiting, health care, mental health services, and transportation services.



O'Neill funds

implemented new program or service, expanded existing program or service, and hired new staff member(s).

Education Alliance



6 years

partnering with O'Neill. Received implementation and continuation implementation grants.



4 sectors

offering 2Gen services in healthcare, education, workforce development/employment, and human services.



10 service areas

serving families through early childhood education, childcare/daycare, parenting groups, home visiting, health care, mental health services, substance use/dependency-related services, adult education or employment services, food assistance related-services, and other direct assistance services.



O'Neill funds

implemented new program or service, expanded existing program or service, hired new staff member(s), provided direct assistance to families, purchased office or program supplies, purchased data management software or services, and established partnership(s) with other agencies.

Enterprise Community Partners



6 years

partnering with O'Neill. Received planning and implementation grants.



1 sector

offering 2Gen services in human services.



1 service area

serving families through other direct assistance services.



O'Neill funds

implemented new program or service, hired contractor/consultant, hired external evaluator, provided direct assistance to families, and established partnership(s) with other agencies.

Friends of the Future



5 years

partnering with O'Neill. Received planning and implementation grants.



1 sector

offering 2Gen services in education.



4 service areas

serving families through early childhood education, parenting groups, home visiting, and food assistance-related services.



O'Neill funds

implemented new program or service, hired new staff member(s), provided direct assistance to families, and purchased office or program supplies.

Literacy Partners



5 years

partnering with O'Neill. Received planning and implementation grants.



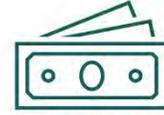
1 sector

offering 2Gen services in education.



2 service areas

serving families through parenting groups and adult education or employment services.



O'Neill funds

expanded existing program or service, hired new staff member(s), hired contractor/consultant, and established partnership(s) with other agencies.

Mamatoto Village



3 years

partnering with O'Neill. Received implementation grant.



2 sectors

offering 2Gen services in workforce development/employment and human services.



4 service areas

serving families through parenting groups, home visiting, mental health services, and adult education or employment services.



O'Neill funds

expanded existing programs or services, provided direct assistance to families, and purchased data-management software or services.

Mercy Center



6 years

partnering with O'Neill. Received implementation and continuation implementation grants.



3 sectors

offering 2Gen services in education, workforce development/employment, and human services.



4 service areas

serving families through childcare/daycare, parenting groups, adult education or employment services, and other direct assistance services.



O'Neill funds

expanded existing program or service, hired new staff member(s), provided direct assistance to families, and purchased office or program supplies.

MetroHealth Foundation



4 years

partnering with O'Neill. Received implementation grant.



1 sector

offering 2Gen services in healthcare.



1 service area

serving families through home visiting.



O'Neill funds

expanded existing program or service.

Rutland Parent Child Center



4 years

partnering with O'Neill. Received implementation grant.



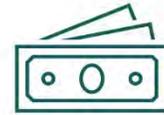
3 sectors

offering 2Gen services in education, workforce development/employment, and human services.



7 service areas

serving families through early childhood education, childcare/daycare, parenting groups, home visiting, adult education or employment services, food assistance-related services, and other direct assistance services.



O'Neill funds

implemented new program or service, hired new staff member(s), and established partnership(s) with other agencies.

Sisters of Charity Foundation/Cleveland Central Promise



6 years

partnering with O'Neill. Received implementation and continuation implementation grants.



2 sectors

offering 2Gen services in education and human services.



2 service areas

serving families through parenting groups and other direct assistance services.



O'Neill funds

implemented new program or service, expanded existing program or service, and established partnership(s) with other agencies.

The Centers



6 years

partnering with O'Neill. Received planning and implementation grants.



4 sectors

offering 2Gen services in healthcare, education, workforce development/employment, and human services.



8 service areas

serving families through early childhood education, parenting groups, home visiting, health care, mental health services, substance use/dependency-related services, adult education or employment services, and food assistance-related services.



O'Neill funds

implemented new program or service, expanded existing program or service, hired contractor/consultant, provided direct assistance to families, purchased office or program supplies, and purchased data-management software or services.

Towards Employment



4 years

partnering with O'Neill. Received planning and implementation grants.



1 sector

offering 2Gen services in workforce development/employment.



3 service areas

serving families through parenting groups, adult education or employment services, and other direct assistance services.



O'Neill funds

implemented new program or service, expanded existing program or service, hired external evaluator, provided direct assistance to families, purchased office or program supplies, and established partnership(s) with other agencies.

United Hospital Fund



3 years

partnering with O'Neill. Received implementation grant.



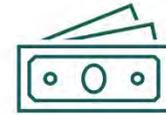
2 sectors

offering 2Gen services in healthcare and human services.



3 service areas

serving families through health care, mental health services, and substance use/dependency-related services.



O'Neill funds

expanded existing program or service, hired external evaluator, and established partnership(s) with other agencies.

United Way of Central Maryland



6 years

partnering with O'Neill. Received implementation and continuation implementation grants.



2 sectors

offering 2Gen services in education and human services.



9 service areas

serving families through early childhood education, childcare/daycare, parenting groups, home visiting, mental health services, adult education or employment services, food assistance-related services, transportation services, and other direct assistance services.



O'Neill funds

implemented new program or service, expanded existing program or service, hired external evaluator, provided direct assistance to families, and established partnership(s) with other agencies.

University Hospitals



3 years

partnering with O'Neill. Received planning and implementation grants.



1 sector

offering 2Gen services in healthcare.



7 service areas

serving families through parenting groups, health care, mental health services, substance use/dependency-related services, food assistance-related services, transportation services, and other direct assistance services.



O'Neill funds

implemented new program or service and hired new staff member(s).