INVESTING IN THE HOLISTIC DEVELOPMENT OF BRIDGEPORT, CONNECTICUT’S CHILDREN

Tauck Family Foundation Case Study
Executive Summary
INTRODUCTION

In 2012, three generations of Tauck family members and Foundation staff adopted a new Theory of Change and Strategic Logic Model to guide the work of the family foundation over the next decade. In 2013, Tauck Family Foundation (TFF) selected and began funding a social investment portfolio of nonprofit organizations and schools focused on developing the organizational capacity to implement and measure social and emotional learning (SEL) in service of improving life outcomes for Bridgeport, Connecticut’s children. At its core, the strategy is designed to increase the likelihood that Bridgeport’s children and youth will “thrive academically and in life” through promoting social and emotional competence, well-being, and school success. The Foundation is now in the ninth year of implementing its outcomes-focused Theory of Change. This TFF commissioned case study describes the experiences and outcomes associated with TFF’s social investing strategy in Bridgeport, including an analysis of quantitative data from three investees with which TFF has partnered continuously over the past eight years.

When asked if TFF’s social investments – and its investee partners’ resulting efforts – improved outcomes for Bridgeport’s children, the response from the 22 investees and community stakeholders interviewed for the study was almost unanimous: “absolutely.” Indeed, tangible progress abounds across TFF’s portfolio: investee partners report year over year progress against their organization development goals and increasingly provide high-quality, outcome-driving activities. Each investee experienced challenges requiring mid-course adjustments, even prior to the COVID-19 pandemic, but all partners have demonstrably progressed in their capacity to enhance the social and emotional skills of the Bridgeport children and youth they serve.

INVESTEE PARTNERS

COHORT 1 - 2013-2018
- Achievement First Bridgeport Academy Elementary School
- Bridgeport Public Schools SEL Initiative
- Horizons at Greens Farms Academy
- New Beginnings Family Academy

COHORT 2 - 2018-2023
- Bridgeport Early Childhood SEL Initiative
- Bridgeport Public Schools SEL Initiative
- Catholic Academy of Bridgeport
- Horizons Bridgeport
- New Beginnings Family Academy

TAUCK FAMILY FOUNDATION SNAPSHOT
LOCATION: Wilton, Connecticut
GEOGRAPHIC FOCUS: Bridgeport, Connecticut
ESTABLISHED: 1994 by Arthur Tauck, Jr.
FUNDER TYPE: Multi-generation private family foundation
MISSION: To invest in organizations and initiatives that equip the children of Bridgeport, Connecticut with the necessary social and emotional skills to thrive academically and in life.
FUNDING APPROACH: Social investing through multi-year general operating and capacity building support to a small portfolio of investees serving Bridgeport’s children.
GRANTMAKING TOTAL SINCE 2013: ~$6.7 million*
STAFF: 3*
*As of 12/31/21

Wilton, Connecticut
Bridgeport, Connecticut
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As of 12/31/21
IN PURSUIT OF OUTCOMES AND IMPACT

TFF’s strategy stayed close to the family’s roots in Fairfield County, CT, with a geographic focus on Bridgeport, and built on historical funding interests, including youth development programs, by focusing on social and emotional learning. An essential part of the updated strategy included adopting a social investing and outcomes-focus approach. Simply defined, this means shifting from a charitable giving mindset (making donations to causes) to becoming a more business-like investor in nonprofit organizations, monitoring a return on investment of concrete, measurable outcomes for the stakeholders the organization serves. TFF’s investees monitor:

• **Organizational Outcomes** by assessing progress towards goals defined in capacity building plans and/or the Impact Capacity Assessment Tool (iCAT).

• **Social & Emotional Learning** implementation and/or student outcomes using surveys and other measurement instruments.

Though TFF prioritizes outcomes, by design, outcomes enjoyed by the investees cannot be causally attributed to the Foundation’s investments. In order to make causal claims within complex environments, an experimental design study is necessary. TFF never intended to commission an experimental design study both due to cost and complexity and because it was not the Foundation’s intention to be able to make causal claims at the outset of the strategy, but rather invest in interventions and activities with existing evidence of effectiveness. However, family members are increasingly interested in ensuring the Foundation can document a “tangible return on investment” per its social investing approach and “even more deterministic way[s]” of confirming that the Foundation’s investments are leading to the desired outcomes.

TFF’s staff and board have learned valuable, sometimes humbling lessons about both the feasibility of their investment approach and the difficulty of supporting investees to move the needle on outcomes within a complex and ever-changing landscape. Over time, it became clear that tactical aspects of TFF’s model – such as the structure of the investments, and tools and templates – while very helpful, were not the main drivers of their most successful partnerships. Ultimately, TFF learned that the quality of the partnerships and perceived success of the investments rests on:

• **Trusting, authentic relationships;**

• **Strong, decisive investee leadership; and**

• **Alignment of values between TFF and investee partners.**

TFF also adopted a more adaptive, equity-focused approach to both implementing their Theory of Change and funding decisions. For example: investees were originally asked to use a common tool to monitor child social and emotional trends but ultimately selected their own measures; the second cohort included more initiatives vs. individual organizations and expanded beyond K-5 to formally include early childhood and high school.

In response to the COVID-19 pandemic, TFF offered flexibility to investees, encouraging them to adjust goals and timelines and to channel TFF funds to address immediate needs. The pandemic’s duration has significantly impacted investees’ ability to achieve the objectives outlined in their proposals to TFF in 2018, but the last two years have also reinforced the importance of prioritizing social and emotional well-being and learning, including resilience and healing, in schools and youth-serving organizations.

TFF INVESTEES RECEIVE:

• 3-5 years of $25,000 to $150,000/year in general operating support (unrestricted funds).

• $10,000 to $100,000/year in targeted capacity building support in four organizational outcome domains, described in detail on TFF’s website.

• Non-monetary assistance including: facilitating connections; technical assistance; strategic counsel and thought partnership; opportunities to collaborate with field experts; and best practice sharing with peer investees and other organizations carrying out similar work.

• Access to cutting-edge SEL research, practice, and assessment tools as well as some of the nation’s most esteemed SEL scholars. Partnerships with The Consultation Center at Yale School of Medicine and the Harvard Graduate School of Education’s EASEL Lab have strengthened several investees’ capacity to implement, measure, and monitor student SEL.

INVESTEES AND FOUNDATION EXPERIENCES

TFF INVESTEES RECEIVE:
Each of TFF's current investees made significant progress during the investment period in terms of building capacity across organizational outcome domains, achieving progress against capacity building plans, and promoting and monitoring social and emotional learning in children and adults. The Consultation Center at Yale analyzed quantitative data from three investees with which TFF has partnered continuously over the past eight years (2012-13 to 2020-21), compiling child and organizational outcome data for Horizons at Greens Farms Academy (HGFA), New Beginnings Family Academy (NBFA), and Bridgeport Public Schools (BPS), with the goal of examining trends in outcomes over the investment period. Child outcome data include aggregated data related to children’s academic performance (measured by standardized assessments), behavior (measured by absenteeism and exclusionary discipline sanction rates, where available), and social and emotional skills (measured by teacher-report or child-report measures). Organizational outcome data for HGFA and NBFA include results from the OMET and iCAT tools.1 For each investee, the analyses found some positive trends in student outcomes and organizational outcomes over the investment period.\footnote{The Organizational Management Capacity Assessment Tool (OMET) is a tool developed by David Hunter, which external evaluators can use to assess the organizational capacity of an institution over time. The Impact Capacity Assessment Tool (iCAT) is a self-assessment developed by Peter York/Algorhythm, which collects data from multiple stakeholders to assess the effectiveness of an organization over time. Because the OMET and iCAT are designed for individual organizations, not initiatives or partnerships, BPS was not required to use those tools. Instead, BPS conducted an educator survey 2-3 times each year from 2014-15 through 2019-20 to collect information about the implementation of SEL in K-8 schools.} Analysis of the quantitative data highlighted several considerations relevant to other foundations or communities that are embarking on a similar journey:

- Be clear from the outset about the strengths and limitations of your evaluation design: if the goal is to draw causal conclusions about the effectiveness of introduced practices, it is important to use experimental design methods. If the goal is to use data to continuously improve practice, it is more important to collect data across multiple timepoints in ways that can be quickly fed back for practitioner’s use.
- Carefully consider the goal(s) for data use before collecting it: balance the cost of collecting new data vs. using existing data.
- Maintain consistent measures over time where possible: regardless of the goal of data use, using the same measure across multiple timepoints makes it possible to observe change.
- Be realistic about investees’ capacity to collect, process, and use data: meet investees where they are – differing capacity to acquire and use data will significantly impact how quickly data can be used for improvement purposes.

\footnote{TFF’s investment was only one of many factors affecting investees over this period, making it impossible to determine whether positive trends are the result of TFF investment.}
INVESTEE JOURNEYS AND OUTCOMES

BRIDGEPORT EARLY CHILDHOOD SEL INITIATIVE

The Bridgeport Early Childhood Social and Emotional Learning Initiative is a collaborative of community stakeholders working to ensure coordinated, high quality SEL programming and supports for the Bridgeport early childhood educators, families, and approximately 2,000 children the Initiative partners serve.

TFF INVESTMENT TOTAL (2018-2021): $476,000

BRIDGEPORT PUBLIC SCHOOLS SEL INITIATIVE

The Bridgeport Public Schools Social and Emotional Learning Initiative (BPS SEL Initiative) seeks to grow and sustain a district-wide learning model that actively engages all initiative stakeholders to deepen their knowledge base, understanding, and commitment to the academic, social, and emotional growth of BPS students, families, and staff. Now in its ninth year, the BPS SEL Initiative seeks to build on the positive results achieved to date and continue to enhance SEL efforts within the district of over 19,000 students and the community at large.

TFF INVESTMENT TOTAL (2013-2021): $1.5M

CATHOLIC ACADEMY OF BRIDGEPORT

The four campuses of the Catholic Academy of Bridgeport provide approximately 900 students in Pre-K to 8th grade a Christ-centered, academically rigorous learning environment, where cultural diversity is welcomed and celebrated. Students are nurtured, encouraged, and challenged in preparation for a successful life of leadership and service.

TFF INVESTMENT TOTAL (2018-2021): $478,000
INVESTEE JOURNEYS AND OUTCOMES (CONTINUED)

HORIZONS BRIDGEPORT

In 2019, Horizons Bridgeport, a regional network of Bridgeport-based Horizons programs, was formed in partnership with its affiliated sites. Horizons Bridgeport aims to expand capacity by opening new programs and expanding current programs. Over the next several years, Horizons Bridgeport plans to serve over 1,000 Bridgeport students; increase and diversify funding to support program growth; identify and support best practices to strengthen program quality; strengthen community relationships; and establish regional infrastructure and governance based on advancing equity.

TFF INVESTMENT TOTAL (2013-2021): $1.5M

NEW BEGINNINGS FAMILY ACADEMY

New Beginnings Family Academy (NBFA) provides approximately 500 students in Pre-K to 8th grade a meaningful, high-quality education through experience-based learning that helps develop essential social, emotional, and critical-thinking skills. NBFA’s progressive pedagogy with an emotionally responsive practice model attends to the whole child, not just academics, and focuses on developing collaborative, socially responsible leaders by organically weaving ethics and character-building into daily instruction in small-class settings. NBFA’s student-focused approach brings out the best in each child by getting to know them individually, encouraging curiosity, and fostering their personal interests.

TFF INVESTMENT TOTAL (2013-2021): $1.5M
CONCLUSION

After almost nine years of implementing a social investing strategy, the Foundation’s priorities have deeply taken root across their portfolio of investee partners even in the face of a global pandemic that destabilized the world. During the investment period from 2013-2021, the Foundation prioritized cultivating trusting, mutually respectful relationships with investees and community stakeholders, to which – along with choosing values aligned investee partners with strong leaders – they attribute their progress toward their strategic objectives: Those objectives center on helping investee partners build organizational capacity to improve child outcomes.

In 2013, investing in Bridgeport was seen as a risk due to seemingly intractable challenges associated with high rates of poverty, massive income inequality, a lack of well-paying jobs, community violence, and a history of government corruption. TFF sought to build on the community’s assets and honor its strengths through an investing model that centered partnership and trust to drive performance and, ultimately, outcomes.

TFF’s investments have helped each investee to build resilience and navigate the better part of the last decade – both in terms of long-standing challenges and unanticipated crises – driven by a shared focus on improving outcomes for children and families. TFF’s staff understood the huge challenge it invited by investing in the complex, resource constrained ecosystem that is Bridgeport and therefore their success rested on not only being laser focused on building the organizational capacity of their investees, but also learning about, understanding, and being responsive to the Bridgeport community’s needs.

TFF and Bridgeport have become known for their SEL work among both the education philanthropy community and an increasing number of districts striving to adopt a holistic approach to education in response to the pandemic’s toll on children. While the Tauck Family Foundation’s story is still unfolding, overall, their investment strategy can be viewed as a success story: not because it can be conclusively determined that Bridgeport’s children are now meeting every academic “success” measure, but because their right to educational experiences that support their holistic development is being honored and a steadfast commitment to improvement is evident in the day-to-day work of each TFF investee.

This is an executive summary from a study commissioned in 2021 by Tauck Family Foundation which describes the experiences and outcomes associated with TFF’s social investing strategy in Bridgeport, Connecticut since 2013. In this study, board members and staff, current and former investee representatives, partners, and Bridgeport education stakeholders shared their reflections on the journey and impact of the Foundation’s ongoing pursuit of better life outcomes for the city’s children. Pamela McVeagh-Lally, SEL Consulting Collaborative, is the lead author of the study, and Joanna Meyer MAT and Michael Strambler PhD, The Consultation Center at Yale School of Medicine, partnered on the study’s development, conducted the analysis of the outcome data, and authored the corresponding quantitative analysis content in the Investee Outcome Data Overview section. TFF staff edited the length and format of the report. To read the full report, please visit Tauck Family Foundation’s website.