



Kate B. Reynolds
Charitable Trust
Investing in Impact

10-Years of Great Expectations

A Fire Sparked



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A Note from Dr. Laura Gerald and Shenell McClurkin Thompson



In 2015, the Kate B. Reynolds Charitable Trust launched Great Expectations, a bold, ten-year, \$40 million special initiative aimed at ensuring all Forsyth County children enter kindergarten ready to learn and leave set for success.

Over the next ten years, we worked to turn this important and lofty goal into action by focusing on shifting systems to ensure families most in need have the support they need to succeed.

During this time, Great Expectations has amplified community power and aligned local early childhood efforts focused on access to high quality, affordable Pre-K; reducing Adverse Childhood Experiences; supporting Family, Friend and Neighbor care; and improving maternal-child health. This report summarizes the impact of this initiative from the perspective of those who led the work.

While so much has been accomplished since 2015, we also know that much work lies ahead. In order to see a Forsyth County where all communities and children are thriving, we must continue collaborating, listening, and learning together.

Centering Equity and Shifting Systems for Our Youngest Learners

When Great Expectations was launched, former Trust President Dr. Karen McNeil-Miller, Vice President of Programs Allen Smart, and Director of Local Impact Joe Crocker identified a gap in the local education space. There were organizations working on third grade reading levels and the high school graduation rate, but there was little funding going to improve outcomes for children under the age of six. Data showed that thousands of children in Forsyth County—many from families with lower incomes—arrived at kindergarten at risk of falling behind their classmates. Research also showed that investing in young children in a multitude of ways could pay dividends later in life.



Great Expectations began before we both came to the Trust. We want to thank Karen McNeil-Miller and the former Trust staff for laying the groundwork for this decade-long commitment and recognizing that our communities cannot thrive if our children are not supported.

As stewards of this work, the goals of Great Expectations resonate with both of us professionally and personally, as we individually reflect below:

“I spent many years practicing pediatrics in Lumberton, NC, where I grew up. I find there to be few more noble causes than supporting and honoring the well-being of children.”

Dr. Laura Gerald

President

Kate B. Reynolds Charitable Trust

“As a native of Winston-Salem, I know that the power and expertise to improve people’s lives lies at the heart of community members who are most impacted by disparities.”

Shenell McClurkin Thompson

Senior Program Officer

Kate B. Reynolds Charitable Trust

On our separate paths to Great Expectations, and as we have worked together over the past years, we have learned that we cannot meaningfully improve outcomes for children and their families with standard, top-down institutional interventions or traditional philanthropic approaches.

We both know that if we are to successfully address long-standing inequities predictable by race and place, we must center equity and shift systems that were designed to create the current dismal results we've seen for years in our community. Improving health and quality of life outcomes at scale means establishing community-driven influence on the policies and systems that shape the lives of people.

Work Rooted in Community

Great Expectations has helped the Trust change the way we work in Winston-Salem. The shift allowed us to truly walk alongside the people leading this transformative work by investing in tools and efforts including:

- Community-led research and data cohorts
- Storytelling, communications and advocacy efforts rooted in the lived experiences of people
- Diverse multi-sector coalitions
- Capacity building for grassroots leaders and community organizations



While these shifts in Trust strategies have been monumental for our foundation, the Great Expectations work is so much bigger than us.

The enduring effort and focus of our grant partners and technical assistance providers, MDC and Kaleidoscope Pathways, is what has made this work possible, and we thank them for their tireless work. We hope this report reflects their long-term commitment.

While we know we cannot reconcile the multi-generational history of systemic injustice, marginalization, and disenfranchisement impacting North Carolina within a ten-year timeframe, we also know the collective power in Forsyth County is capable of helping us reach a shared vision for a future that honors everyone's humanity.

It is our hope that Great Expectations partners can reflect on this initiative with pride and receive this report as an offering, a resource, and a testament to tremendous work.

Working Forward

While we celebrate the culmination of Great Expectations and the momentum we've generated to elevate the well-being of young children and families in Forsyth County, we want to be very clear: we are not stepping away from our commitment.

In order for children to be well, we have to create a thriving community where everyone can be well. While Great Expectations is sunseting, the effort will continue as part of our Inclusive Economy work to foster economic conditions where everyone has access to opportunity and to develop systems-based solutions to address the root causes of poverty.

Great Expectations has allowed Forsyth County to establish a shared vision for improving the lives of young children, and it has also showcased how the cohesive movement of our community can shift power and connect impacted people to real levers of lasting change.

This evaluation documents the strides made by people who care about Forsyth County and understand that seeing the full humanity of all of our neighbors, especially our children, is the responsibility of our community, policymakers, institutional leaders, and elected officials.

Thank you to Trust Director of Learning and Impact, Dr. Kristen Naney, and our evaluators from [Frontline Solutions, LLC](#) for leading this retrospective. We'd also like to especially thank all those who have worked alongside us, for honoring the well-being of Forsyth County's young children and families, and for joining us in helping our community reach its full potential.



Dr. Laura Gerald,
MD, MPH
President



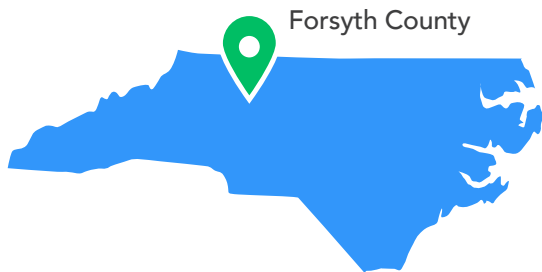
Shenell
Thompson, MA
Senior Program
Officer, Local
Impact in Forsyth
County

Executive Summary

“A fire has sparked in our community. I see people jumping into the fight, regular community members like myself who were brought into the fight, and now I’m in this fight to the end now.”

Community Researcher

The Kate B. Reynolds Charitable Trust’s mission is to improve the health and quality of life for residents in Forsyth County and around North Carolina, including the youngest residents in the place we call home. In 2015, the Trust observed how thousands of children in Forsyth County, many from families with low incomes, would arrive in kindergarten each year at risk of falling behind their classmates. Research underscored that helping children reach age-appropriate developmental milestones before first grade is critical to long-term educational success.



After years of developing its strategy, the Trust launched the Great Expectations special initiative in 2015 as a bold, 10-year effort to transform early childhood outcomes in Forsyth County. Grounded in evidence-based research and proven national models, the Trust made a \$30 to \$40 million commitment to ensure that children enter school healthy, ready to learn, and positioned for success beyond kindergarten. In the early years, the initiative focused on root causes of disparities in early childhood, including systems designed to advance opportunities for some groups and deny opportunities to others. It invested in high-



impact programmatic strategies, such as Forsyth Connects, a universal home-visiting program offering free in-home nurse visits to families with newborns.

Since this time, the Trust has undergone a fundamental shift from being a funder of discrete, programmatic interventions to a catalyst for racial equity and systems change work. This evolution required both an internal reorientation of the Trust’s goals, priorities, and grantmaking, particularly within the Great Expectations special Initiative, and an external reckoning with its history.

While the initiative officially culminated in 2025, this evaluation presents an opportunity to reflect on the past 10-years and plan for the Trust’s work ahead on Great Expectations’ three main strategic goals:

- Increase health access and support before and after babies are born.
- Increase access to quality childcare and early learning.
- Help young children thrive by helping families thrive.

Evaluation Overview

The Trust partnered with Frontline Solutions to conduct a 10-year evaluation of the Great Expectations special initiative to assess its impact and to understand grantees' experiences with the Trust's racial equity and systems change shift. Frontline Solutions used a mixed-methods qualitative research approach to design evaluation instruments based on three key learning objectives:

- Overall Impact: Assess the impact of the 10-year Great Expectations special initiative.
- Systems Change Impact: Identify stories of impact and experience with the Trust's shift toward racial equity and systems change in Great Expectations.
- Continuing the Work: Identify options and implications for continued work on early childhood in Forsyth County.

Following data collection, findings were triangulated across the three primary instruments (surveys, interviews, and focus groups) and secondary data (documents and data from the Trust). This report presents the major findings of the evaluation and provides recommendations for the Trust's future work.

The Trust's Shift to Racial Equity and Systems Change

In 2016, Dr. Laura Gerald became president of the Trust and sharpened the initiative's focus on systems change and racial equity, bringing greater clarity and accountability to the work. Recognizing community concerns about top-down decision-making in philanthropy, the Trust created meaningful space for community leadership and shared power. The addition of Shenell McClurkin Thompson as a Senior Program Officer in 2020, further helped the Trust shift its Forsyth County focus from investments in primarily large, legacy institutions to advancing a grassroots, community-driven approach.

In 2022, the internal transformation was reinforced through a public reckoning during the Trust's 75th anniversary. This was marked by a "truth-telling journey" through regional convenings in communities across the state, and related videos and op-eds. During these events, Dr. Gerald acknowledged the organization's historical ties to wealth generated through tobacco and enslaved labor, and committed the Trust to socially responsible investments. Together, these changes catalyzed a broader culture shift within



the Trust and across its grantee ecosystem. This was reflected in key changes that guided how Great Expectations operated, including:

- **Grantmaking shifts:**
 - Funding partner groups to build capacity of smaller organizations to better position them for future funding.
 - Partnering with [MDC](#) and [Kaleidoscope Pathways LLC](#) for technical assistance and capacity building.
 - Providing general operating support to grassroots groups and for institutional partners in community-led research.
 - Investing in facilitation and mediation to sustain coalitions.
- **Expanded support beyond funding:**
 - Embedding technical assistance as a core strategy.
 - Connecting grantees with culturally aligned evaluators and organizational development support.
- **Rebalancing power in philanthropy:**
 - Naming and mitigating funder influence in decision-making spaces.
 - Using funding leverage to address inequitable dynamics within coalitions.
 - Modeling transparency and accountability for the broader philanthropic field.

Creating the Conditions for Community-Driven Change

Through its shift to supporting racial equity and systems change, the Trust repositioned itself as a funder and partner focused on creating the conditions for community-driven change rather than prescribing solutions. This included investments in four interrelated areas:

- **Community Power-Building:** Great Expectations investments increasingly centered community members, particularly Black mothers, informal caregivers, and neighborhood residents, who

moved from being service recipients to becoming researchers, advocates, and leaders. 92% of survey respondents reported improved pathways for community members to tell their own stories, and 75% observed greater power for residents to shape decisions.

- **Collaboration and networks:** Great Expectations investments helped shift the early childhood field from siloed efforts to coordinated, cross-sector collaboration across the county. For example, coalitions such as The Pre-K Priority and the We Heal Together Winston-Salem Initiative leveraged Trust funding to attract millions in public dollars, including \$4 million in the American Rescue Plan Act (ARPA) funding and \$4 million in federal Substance Abuse and Mental Health Services Administration (SAMHSA) funding.
- **Systems and policy change:** Public narratives about the importance of early childhood emerged, with a greater emphasis on race and class disparities. In addition, community-led research and advocacy contributed to measurable policy shifts. These included reduced barriers to Pre-K enrollment, trauma-informed changes to school discipline policy, and the integration of family-friendly performance indicators into the Chamber of Commerce's business certification program.
- **Capacity building and data infrastructure:** Through partnerships with MDC and KPLLC, the Trust invested in evaluation, coalition facilitation, and technical assistance. Grantees cited data and evaluation, advocacy, and communications as the most important areas of strengthened capacity.



Signs of Progress

The Trust's investments in community power enabled Great Expectations grantees to achieve measurable progress across Forsyth County, from expanded community leadership to institutional culture change and improved family experiences within early childhood systems. Great Expectations helped translate community leadership into measurable progress across five focus areas:

- **Maternal and infant health:**

- The By Mothers project shifted research power by certifying Black mothers as researchers, who then recruited 200 mothers for a community report.
- As a result of the community-led findings, Atrium Health Wake Forest Baptist's birth center integrated new education on racial disparities and patient respect into its standard curriculum for all birth center staff.
- The work has drawn national attention and interest from other hospitals seeking to replicate the model.

- **Adverse Childhood Experiences and toxic stress:**

- Love Out Loud's Spanish-first, community-led research generated culturally rooted data on Adverse Childhood Experiences (ACEs) where little previously existed.
- A follow-on community-led project, Sustenido Forsyth Latine, helped identify immigrant-specific ACEs, such as family separation or deportation risk, expanding understanding beyond traditional screening tools.
- These findings informed Forsyth County's school board trauma-resilience practices.

- **High-quality Pre-K and reducing bias in early education:**

- Data-driven collaboration across initiatives built a shared evidence base and strengthened countywide Pre-K infrastructure and planning to inform efforts, such as Universal Pre-K planning.



- Trust investments leveraged millions in public funding, including \$4 million in ARPA dollars.
- Community organizing and trauma-resilience training contributed to major policy shifts, including a 49% reduction in K–3 out-of-school suspensions for Black boys.

- **Family, Friend, and Neighbor caregiving:**

- Informal caregivers gained long-overdue visibility in policy and practice.
- New training, play-and-learn programs, and advocacy efforts elevated Family, Friend, and Neighbor (FFN) care as a critical part of the childcare ecosystem.
- FFN caregivers formed an advocacy group and secured formal recognition, including a mayoral proclamation

- **Family supports and economic advancement:**

- Neighborhood residents shifted from service recipients to organizers and decision-makers.
- Communities like Castle Heights and Salem Gardens led successful housing repair, tenant organizing, and leadership development efforts.
- Residents built durable power through grant writing, advocacy, and formal leadership structures.

A Decade of Change, with More to Come

Great Expectations catalyzed a decade of interconnected systems and community change:

- Community-led maternal health research shifted power to Black mothers and influenced institutional practice; trauma-informed work elevated culturally rooted data and community voice.
- Early childhood investments drove policy change, leveraged public funding, and reduced exclusionary discipline.
- FFN caregivers and neighborhoods gained visibility, voice, and organizing power.

These efforts built lasting community leadership and infrastructure that the Trust can carry forward through all its work. As Dr. Laura Gerald remarked, “Internally, our insistence on self-improvement has been the main result of the initiative.”

The Path Forward

Since the Great Expectations Initiative culminated in 2025, the Trust has a clear opportunity to build on a decade of learning and deepen its impact across Forsyth County’s early childhood ecosystem. To do so, stakeholders identified several priority directions for the Trust’s next phase of work:

- **Sustaining community-centered leadership and collaboration:** Investing in resident leadership, supporting cross-organizational infrastructure, recognizing FFN caregivers as essential to the early childhood ecosystem, and linking early childhood investments to housing, food security, transportation, and workforce systems.
- **Strengthening early childhood infrastructure and workforce:** Supporting direct, flexible investments in centers and educators, professional development and coaching, and leadership pipeline development to ensure continuity and quality.
- **Building durable policy and advocacy capacity:** Supporting advocacy training, data use, coalition-building, and pathways to scale local insights to state-level systems change.
- **Promoting sustainability and funder collaboration:** Providing longer funding commitments, unrestricted and capacity-building support, and organizing alignment with peer funders.
- **Planning strategically for the future:** Communicating transparently about the Great Expectations sunset, refining strategic focus, and proactively planning for leadership succession to protect community trust and sustain momentum.







Introduction

Since its founding, the Trust's mission has been to improve the quality of life for low-income people in Forsyth County and to improve health care around the state. Over the years, the Trust helped organizations cover operational costs for serving meals, providing assisted care to elders, and offering educational program among other services. Under the leadership of former Trust President Dr. Karen McNeil-Miller, the Trust began addressing the root causes of educational, health care, and legal issues and investing in evidence-based programs to decrease disparities.

Research underscored that helping children reach age-appropriate developmental milestones before first grade is critical to long-term educational success. In Forsyth County, nearly half of children, many from financially disadvantaged families, arrive in kindergarten each year at risk of falling behind their classmates. This presented an opportunity for the Trust to address this issue in systemic ways and put the county's youngest residents on a stronger path.

When parents and caregivers in Forsyth County need support with caring for and educating their young children, they are navigating a childcare system with funding and access gaps to fill. Forsyth County ranks at or near the bottom of North Carolina counties in terms of the funding it receives to enroll the more than 2,700 children in the county that are eligible for [NC Pre-K](#).¹ In 2019-20, only 27% of eligible children in the county were enrolled as compared with 67% in neighboring Guilford County.

In addition, families experiencing poverty in Forsyth County—primarily families of color—have not had a strong voice in decision-making when it comes to addressing the needs of their children, and approximately two-thirds of young children in Forsyth County are not in licensed childcare.²

¹ [The Pre-K Priority: A Call to Action](#). September 2020. Page 1.

² [Family, Friends, and Neighbor Care in Forsyth County](#). January 2018. Page ii.

Forsyth County by the Numbers

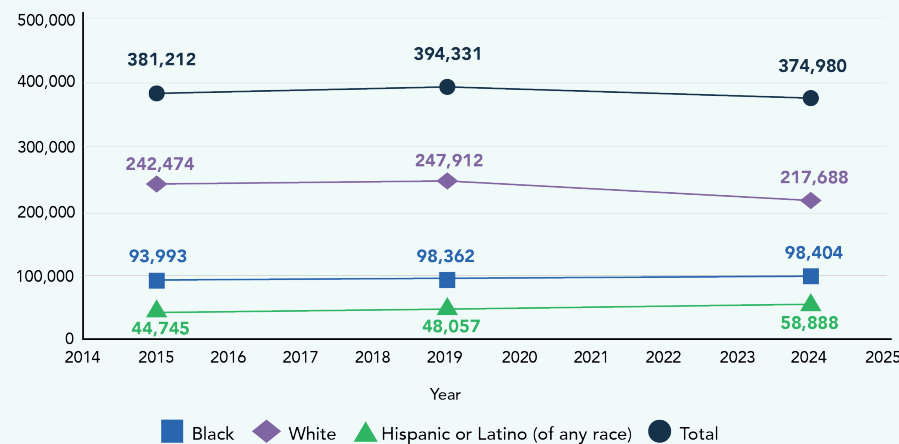
To place the Great Expectations initiative in context, the following data reflect changes in population, family poverty, third grade reading, infant mortality, and maternal mortality by race/ethnicity in Forsyth County in 2015, 2019, and 2024.

POPULATION

Forsyth County's population³ as of 2024 was 374,980 residents. 58% of residents were White, non-Hispanic, 26% Black or African American, and 16% Hispanic/Latino. In 2024, 22,353 of Forsyth County residents were under five years old.

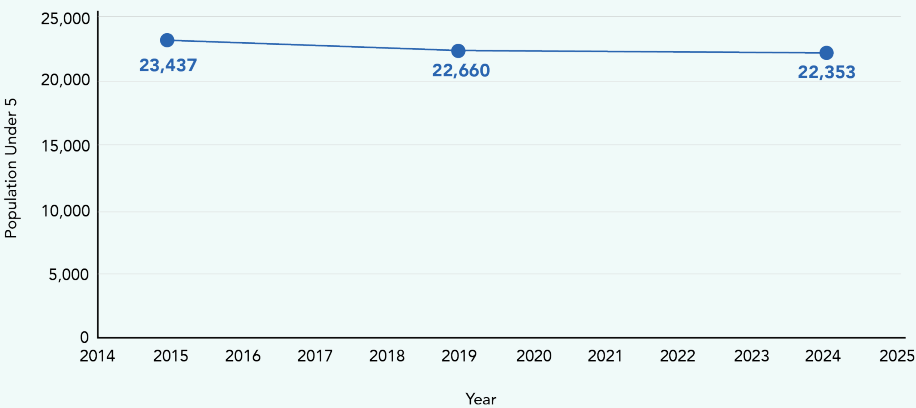
Population Size by Race/Ethnicity

Source: American Community Survey 5-Year Estimates for 2015, 2019, and 2024



Population Under Five Years Old

Source: American Community Survey 5-Year Estimates for 2015, 2019, and 2024



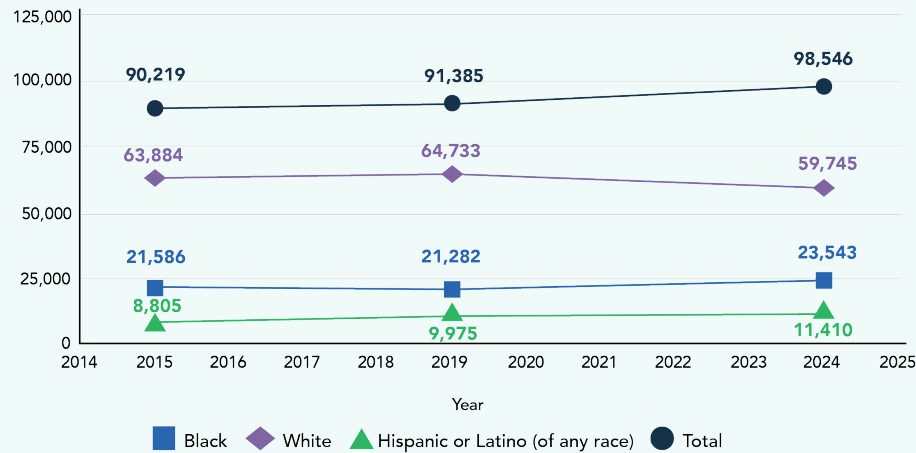
3 American Community Survey 5-Year Estimates for 2015, 2019, and 2024.

FAMILY POVERTY

Since 2015, family poverty⁴ has increased overall in Forsyth County. White family poverty has decreased since 2015, while Black and Hispanic/Latino family poverty has increased since 2015.

Family Poverty by Race/Ethnicity

Source: American Community Survey 5-Year Estimates for 2015, 2019, and 2024

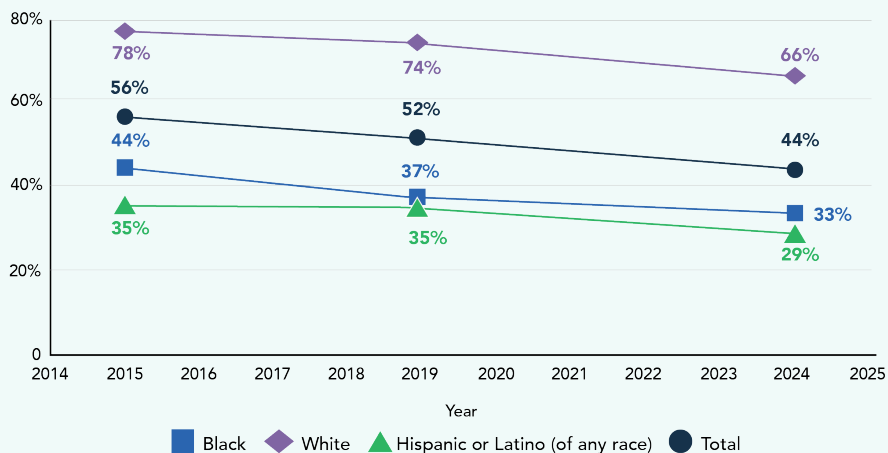


THIRD GRADE READING LEVELS

Overall, third grade reading level⁵ proficiency has decreased in Forsyth County since 2015. In the 2024-2025 school year, 44% of all students met third grade reading proficiency standards compared to 52% of students in the 2018-2019 school year and 56% of students in the 2014-2015 school year. About a third (29%) of Hispanic/Latino and (33%) of Black students met third grade reading proficiency standards in 2024-2025 school year, compared to 66% of White students.

Third Grade Reading Level Proficiency by Race/Ethnicity

Source: North Carolina Department of Public Instruction Proficiency Data for 2015, 2019, and 2024



⁴ American Community Survey 5-Year Estimates for 2015, 2019, and 2024.

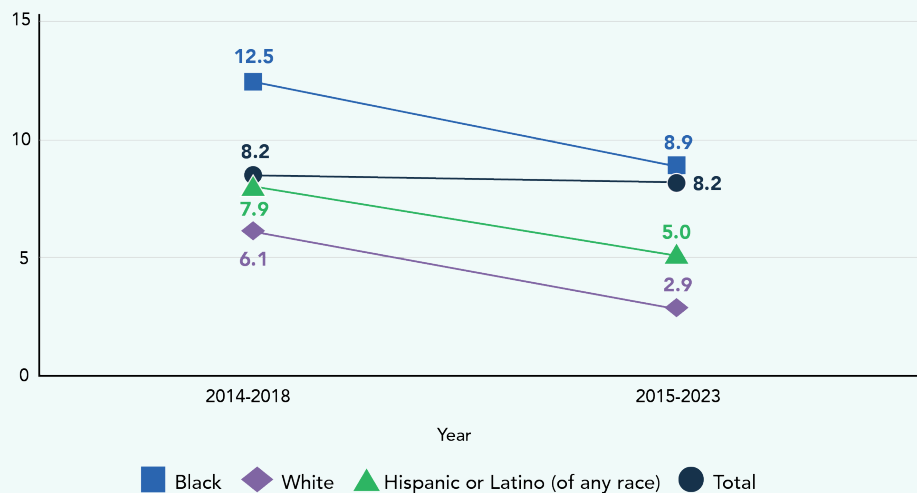
⁵ Forsyth County Health Department.

INFANT MORTALITY

Across all races and ethnicities, the infant mortality⁶ rate has dropped since 2014.

Infant Mortality Rate by Ethnicity/Race

Source: Forsyth County Health Department

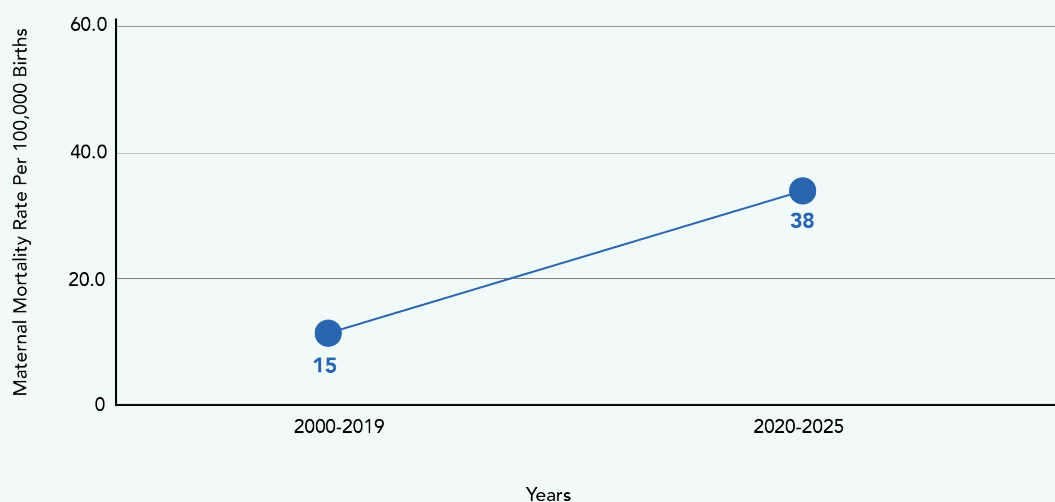


MATERNAL MORTALITY

The maternal mortality rate in Forsyth County was twice as high during the past six years (2020-2025) compared to the preceding two decades (2000 -2019), which was likely influenced by the impacts of COVID-19. At the state level, maternal deaths have declined significantly in recent years, indicating a potential corresponding downward trend in Forsyth County as well.

Maternal Mortality Rate

Source: CDC Wonder and NC State Center for Health Statistics



⁶ North Carolina Department of Public Instruction. District Proficiency Data for 2015, 2019, and 2025. <https://public.tableau.com/views/Proficiency-DistrictLevel/Proficiency-DistrictLevel?:showVizHome=no>.



Great Expectations Created to Address Disparities

In 2015, Dr. Karen McNeil-Miller (pictured above right), alongside Allen Smart, Joe Crocker, and Doug Easterling, worked closely with community partners and national experts to design a strategy to address these disparities, drawing on evidence-based approaches and proven national models. Building on this effort, the Trust launched the Great Expectations special initiative as a bold, ten-year effort to transform early childhood outcomes in Forsyth County. With a \$30–\$40 million commitment, the initiative sought to advance innovative strategies to improve the lives of young children and families. The initiative was designed to ensure that Forsyth County’s young children, particularly those from families with low incomes, would:

- Reach age-appropriate developmental milestones from birth through five years old.
- Enter kindergarten healthy and ready for school.
- Leave kindergarten with the knowledge, skills, and behaviors necessary for success in first grade and beyond.

Unlike traditional initiatives anchored in a single

coalition, Great Expectations was intentionally adaptive and decentralized. It emphasized innovation, drawing on programs that had demonstrated results elsewhere and tailoring them to Forsyth County’s context. While the initiative maintained a focus on root causes and systems change, it also invested in high-impact programmatic strategies. At the launch, \$1.4 million in initial grants were announced to support local libraries in low-income neighborhoods, invest in playgrounds at Title 1 schools, get more books into homes with young children, and Forsyth Connects, a universal home visiting program connecting nurses and families during the first weeks of an infant’s life.

In 2016, Dr. Laura Gerald became president of the Trust and introduced a refined framework for articulating clearer goals and benchmarks, sharpening the initiative’s focus on systems change and racial equity, and strengthening transparency and accountability to the community. She also underscored a core principle of the initiative’s new theory of change: while the Trust could play an important role, no single institution can transform systems alone.

The Trust team also took lessons from its statewide work that showed directly funding and centering grassroots groups and equity were critical to advancing systems change. Once Shenell McClurkin

Thompson joined the Trust in 2020, she was able to bring this approach to Forsyth County, building on her deep grassroots connections. The initiative soon strengthened its commitment to listening and investing in community members to lead. This included centering mothers as community researchers and leaders; training programs that value the cultural and social significance of informal caregiving; and approaches to traumatic childhood experiences grounded in cultural competence and care, prioritizing deep understanding first and intervening second.

By the end of 2025, the Trust had distributed nearly \$36 million in Great Expectations funding to 39 organizations. The top areas of funding were: \$8.9 million to Healthy Births, \$8.4 million to Formal Care, \$5.9 million to Adverse Childhood Experiences, and \$3.3 million to Informal Care.

While the initiative officially culminated in 2025, this evaluation presents an opportunity to reflect on the past 10-years and plan for the Trust's work ahead on Great Expectations' three main strategic goals:

- **Increase health access and support before and after babies are born.** Great Expectations supported efforts to narrow racial disparities in birth and postpartum outcomes and reduce the occurrences and impact of Adverse Childhood Experiences and toxic stress among young children.
- **Increase access to quality childcare and early learning.** Great Expectations supported the advancement of high-quality, culturally responsive care through the Universal Pre-K and family, friend, and neighbor care.
- **Help young children thrive by helping families thrive.** Great Expectations supported whole-family, 2-Generation approaches to economic mobility for families with low incomes.

This report is divided into six main sections that tell the story of the 10-year investment:

1. Learning Objectives and Methodology
2. The 10-Year Pathway of Great Expectations
3. The Impact of the Trust's Shift to Racial Equity and Systems Change
4. Creating the Conditions for Community-Driven Change
5. Community Outcomes and Signs of Progress
6. The Path Forward





Learning Objectives and Methodology

The Trust partnered with [Frontline Solutions](#) to conduct the 10-Year evaluation of Great Expectations to assess its impact, and understand grantees' experiences with the Trust's racial equity and systems change shift. Frontline Solutions used a mixed methods qualitative research approach to design evaluation instruments based on three key learning objectives:

Objective 1: Overall Impact	Objective 2: Systems Change Impact	Objective 3: Continuing the Work
Assess the impact of the 10-year Great Expectations special initiative. What outcomes or successes (anticipated, actual, and unanticipated) have occurred throughout the initiative that signaled progress and community change?	Identify stories of impact and experience with the Trust's shift toward racial equity and systems change in Great Expectations. What has been the impact (anticipated, actual, and unanticipated) of the Trust's shift on grantees, their organizations, and their respective nonprofit sectors? What changes have occurred related to capacity building, networks, policy change, community engagement, and power that have propelled the work forward in the community?	Identify options and implications for continued work on early childhood in Forsyth County. What aspects of the initiative are important to continue to reduce inequities in health and education in the future?

After the August-September 2025 data collection period, findings were triangulated across the three primary instruments (survey, interviews, and focus groups) and secondary data (documents and data provided by the Trust). The data collected is not intended to be generalized to all grantees of Great Expectations, and survey statistics included in this report describe frequencies and proportions only of those who responded to the survey.

Document Review	Frontline reviewed a number of documents, including past reports created about Great Expectations, a summary of grantee reports from 2022-2025, and Great Expectations grantmaking data from 2015-2025.
Interviews (n=7)	Frontline conducted interviews with grantees, technical assistance partners, and Trust staff.
Focus Groups (n=10)	Frontline conducted three semi-structured focus groups: two groups with Great Expectations grantees and one group with Trust staff.
Survey (n=12) 50% response rate	Frontline conducted an independent 10-Year Evaluation survey of grantees and community partners. Out of 24 invited individuals, 12 responded for a 50% response rate. Of the respondents: • 58% have received grant funding from Great Expectations. • 4 grantee respondents were only funded after 2020, 2 grantee respondents were funded both before 2020 and after 2020.







The 10-Year Pathway



of Great Expectations

Timeline

2015:

- Former Trust leadership Dr. Karen McNeil-Miller, Allen Smart, Joe Crocker, and Consultant Doug Easterling design and help launch Great Expectations with audacious goals to change early childhood outcomes in 10-years through a \$30 to \$40M investment. The effort aims to increase community engagement and improve systems that serve low-income families.
- At the launch, the Trust announces \$1.4 million in initial grants to support local libraries in low-income neighborhoods, invest in playgrounds at Title 1 schools, get more books into homes with young children, and provide a universal home visiting program called Forsyth Connects connecting nurses and families during the first weeks of an infant's life.

2016:

- Dr. Laura Gerald becomes President of the Trust.

2017:

- The Trust funds the Pediatric Holistic Health Initiative, which is a new systems model piloted by Imprints Cares to integrate a holistic set of services into pediatric clinics to expand access to high-quality health care.

2018:

- The Trust explicitly defines Great Expectations goals.

2019:

- The Trust develops and applies a more specific racial equity and systems change lens to the work.

2020:

- Shenell McClurkin Thompson joins the Trust, giving nonprofit leaders an ally in philanthropy.

- The Trust commits to equitable grantmaking, making significant investments directly to small, grassroots organizations led by people of color.
- Racial justice becomes a national priority, and the pandemic hits the childcare industry particularly hard with closures, expensive safety measures, and educator burnout.

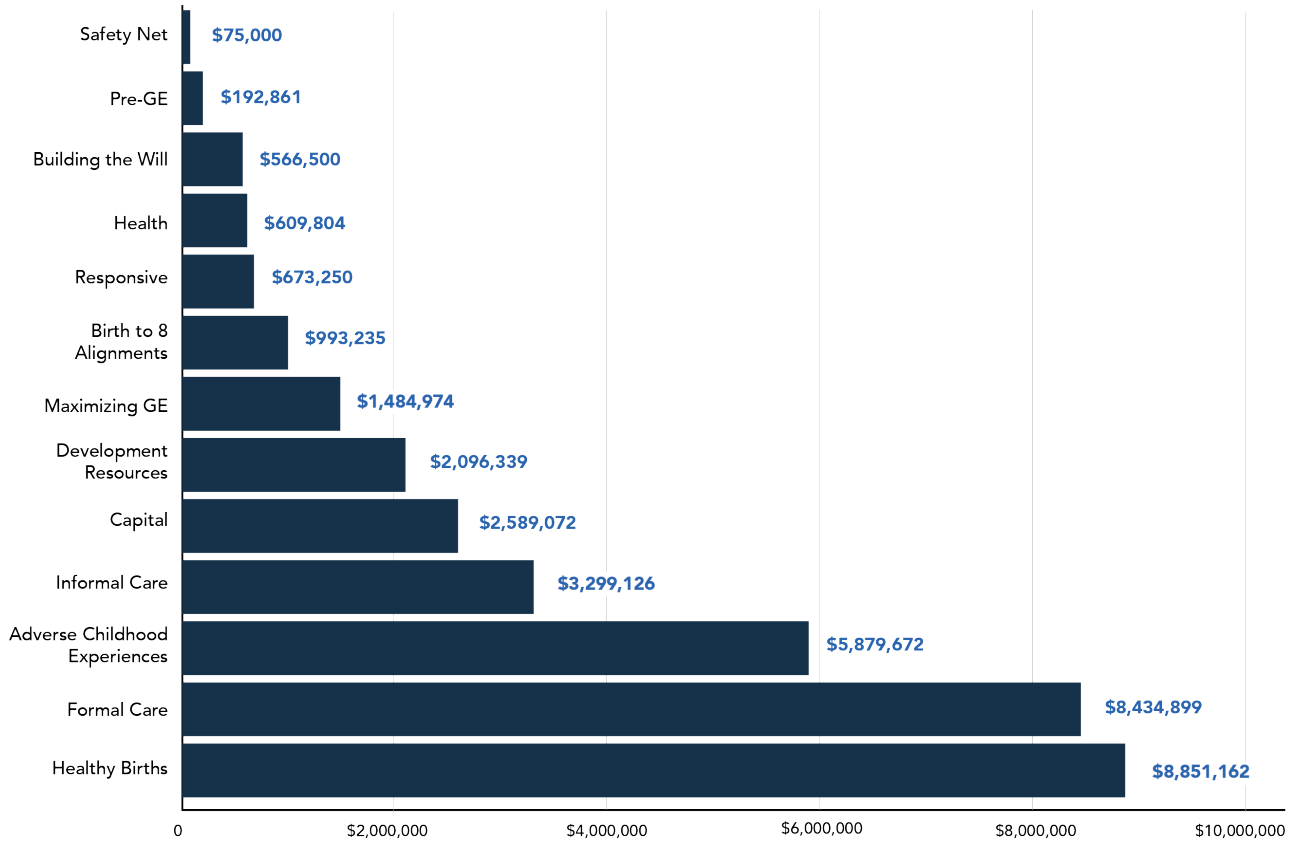
2022:

- The Trust's Forsyth County 75th anniversary event marked a significant, public shift for the foundation, where Dr. Gerald makes the Trust's commitment to racial equity more explicit by discussing the need to center Black and low-income children.
- Great Expectations further commits to investing in community-led work through three-year grants distributed to grassroots, power-building, and coalition-building efforts. Great Expectations distributes \$1.6 million in funding to grassroots organizations in 2022, a peak in the 10-year program.

2025:

- By this point in time, the Trust distributes nearly \$36 million in Great Expectations funding to 39 organizations (28% of grantees are grassroots organizations and 33% are BIPOC-led organizations). The top areas of funding are: \$8.9 million to Healthy Births, \$8.4 million to Formal Care, \$5.9 million to Adverse Childhood Experiences, and \$3.3 million to Informal Care.
- The Trust begins moving much of the Great Expectations work into the larger Local Impact program, with a focus on building an inclusive economy.

Total Grantmaking by Great Expectations Goals (2015-2025)





The Trust's Shift to Racial Equity and Systems Change

Over the last decade, the Trust has undergone a fundamental shift from being a funder of discrete, programmatic interventions to a catalyst for racial equity and systems change work. This evolution required both an internal reorientation of the Trust's goals, priorities, and grantmaking and an external reckoning with its history, particularly within the Great Expectations special initiative.

Leadership Changes Enabled the Trust's Reorientation

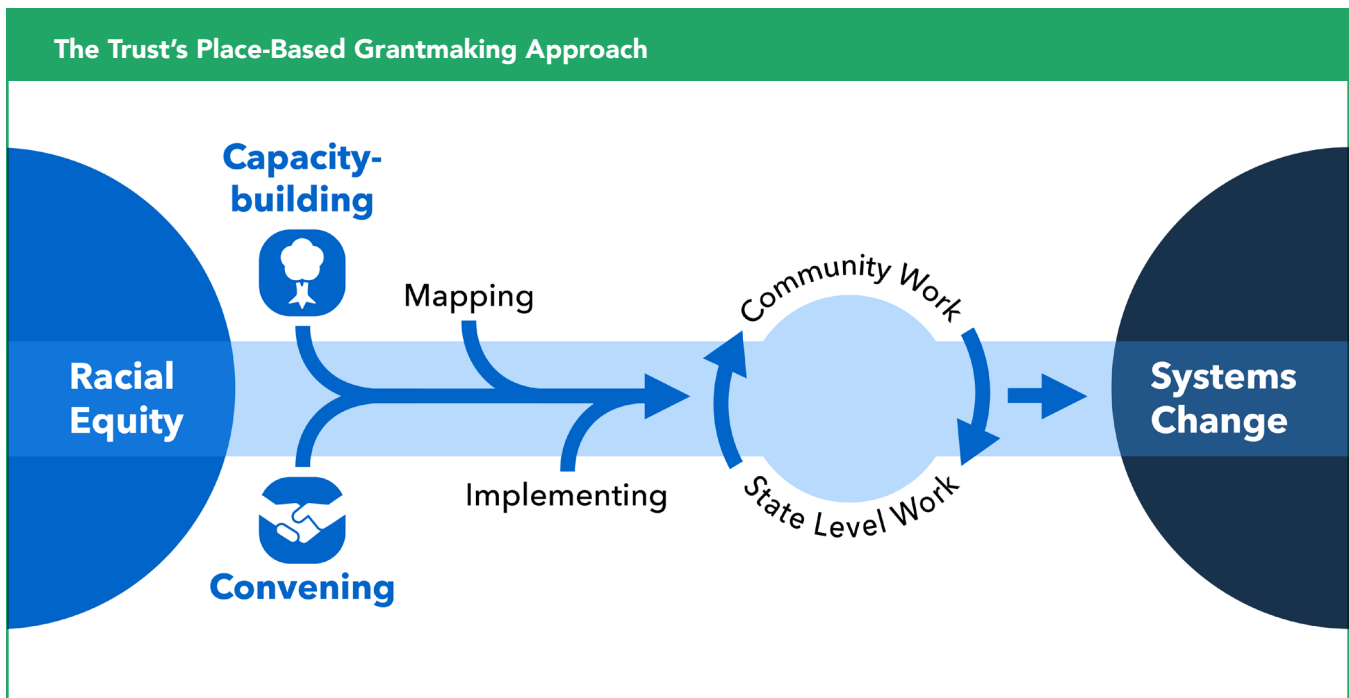
"Internally, our insistence on self-improvement has been the main result of the initiative."

Dr. Laura Gerald

President

Kate B. Reynolds Charitable Trust

When Great Expectations was launched, it was a visionary initiative focused on improving outcomes for all young children in Forsyth County. However, it lacked clear goals for what it would achieve, focusing instead on implementation of innovative programs that showed promise in other parts of the state or country. In addition, the timeframe and resources did not match the scale of the initiative's ambitions. After Dr. Laura Gerald became president in 2016, she brought clarity and discipline to the initiative, defining systemic goals for improving early childhood outcomes and establishing a framework for accountability. An early sign of the changes to come was reimagining the Trust's "Poor and Needy" division, where Great Expectations was housed, as the "Local Impact in Forsyth County" program, interpreting the goals of the Trust's founder in contemporary terms with a focus on racial equity.



Dr. Gerald also came to understand that many in the Winston-Salem community felt decisions were too often made on their behalf by power brokers behind closed doors. She recognized that transforming how decisions were made in Forsyth County was just as important as achieving specific outcomes. In response, Dr. Gerald and the Trust team intentionally used their influence to create space for community members to shape and drive the changes they wanted to see.

In 2020, the Trust hired Shenell McClurkin Thompson as a Senior Program Officer, who subsequently helped the Trust shift its focus from investments in primarily large, legacy institutions to advancing a grassroots, community-driven approach, grounding the foundation's new systems change framework in lived experience. This included moving away from funding individual programs, such as home-visiting models or literacy efforts, to supporting coalitions and collective strategies that address the root causes of racial and economic inequities.

The initiative's approach to systems change is captured in the Trust's Equity Framework, which outlines how deep, local investment in capacity and coalition-building drive cycles of change in the systems that shape local conditions, including governments, hospitals, schools, etc.

A Public Reckoning

"The truth of our history is that the house of KBR is built on a foundation that is characterized by the extraction of labor from Black people and on wealth generated from tobacco, which has caused tremendous death, disease, and chronic illness. We must work to repair our foundation. We may not be responsible for the conditions of that foundation, but if we are to live in this house, we are responsible for repairing it."

Dr. Laura Gerald

President

Kate B. Reynolds Charitable Trust



During the Trust's [75th anniversary](#) in 2022, Dr. Laura Gerald led the Trust in a public reckoning, acknowledging that its endowment was built on wealth generated from tobacco and the sale and labor of enslaved Black people. She [affirmed](#) that "philanthropy has a unique opportunity to lead in this space given the power, privilege, and resources we hold." The Trust subsequently divested from tobacco holdings and committed more than \$100 million of the foundation's corpus to socially responsible investments that benefit North Carolinians and support community-led economic opportunities.

Staff reflected that, while these dynamics were widely known, Dr. Laura Gerald was saying things out loud that nobody previously acknowledged. "She said, 'We are here trying to make things different. When we say historically marginalized, we mean Black children, we mean poor children, we mean children that are growing up on the east side of Route 52,'" one staff member shared.

A Culture Shift for Grantees

The Trust's strategic shift was also mirrored in how grantees approached their work. For organizations not previously committed to racial equity practices, the Trust provided guidance and support on how to become more equity-oriented. One grantee reported that Great Expectations enabled them to foster a more diverse staff that reflects the community,

provide bilingual resources, incorporate accessibility considerations, offer racial equity training for staff, and implement new trauma-informed practices in daily tasks. Another grantee shared, "Great Expectations allowed us to position ourselves as a key connector between grassroots communities and institutional partners. We integrated a racial equity lens into organizing and advocacy, ensuring that families most affected by poverty are at the center of solutions."

Another grantee shared, "Great Expectations created a culture shift among organizations working with or on behalf of community members to truly center the needs and voices of the community. Great Expectations programs also directly uplifted and centered the stories from those who are marginalized by and excluded from our systems, including informal caregivers, immigrant families, and communities of color." This combination of internal culture change and external transparency redefined how the Trust understood its role, not only as a grantmaker, but also as a model and steward of power, equity, and accountability.

Changes to Grantmaking

As the Trust shifted its philosophy, its grantmaking practices evolved accordingly. The transition toward systems change and supporting grassroots organizations required a fundamental rethinking of how money flowed and to whom.

"We were very interested in innovation and one of the things we thought a lot about was how do you find the best programs that are working around the country and implement them locally?" explained one staff member about the early years of Great Expectations. Because programs at that scale are typically implemented by large institutions, the Trust sought out partners within major institutions and large organizations who were committed to the goals of Great Expectations.

Still, as the staffer explained, "It's just different if you give institutional leaders who have a good community mindset money versus if you start with community and start with the people who are experiencing disparities and say what would work here? What are the things that aren't working now? How do you build things differently? And so no one's asking for change, they're

really demanding change, and they're able to hold institutions accountable."

Funding grassroots groups directly was a learning process for the Trust. Program officers had to build deeper relationships within communities to identify and support leaders doing critical work, many of whom were not connected to traditional grantmaking processes or aware of funding opportunities. Within the Trust, there was a learning curve around how to effectively support organizations in building the board governance and financial management systems required to accept and steward grant dollars. In the end, to facilitate this shift, the Trust:

- Funded partner groups to build capacity of smaller organizations to position them for future funding.
- Partnered with MDC and Kaleidoscope Pathways LLC to provide technical assistance, compliance support, and capacity building for emerging grassroots groups.
- Offered operational support for institutional researchers participating in community-led projects.
- Provided facilitation and mediation resources to sustain coalition-building.

These changes didn't happen without their challenges. Overall, grantees expressed appreciation for the Trust's transparency, as well as its flexibility and responsiveness. However, they also had strong reactions to other changes in the grantmaking.



For example, some partners saw three-year grant cycles as making it challenging to sustain long-term, systems change efforts. As one grantee put it, "Originally this was imagined as a 15-year commitment. Breaking it down into three-year cycles makes it hard to get new projects off the ground." It is important to note that while most grants are awarded through three-year cycles, the Trust typically funds grantees for subsequent cycles.

In addition, staff discovered that introducing new funding streams into under resourced ecosystems could unintentionally create competition and tension among organizations. As one Trust leader noted, "When you bring money into a situation, you create issues that weren't there before. Competition develops."

Incorporating Technical Assistance

The Trust recognized that achieving systems change required more than funding. As one staff member explained, "Our investments in grassroots organizations early on weren't just about dollars—they included technical assistance, partnerships with MDC, and more.

We came in with the mindset that we want you to win. We're circling around you, making sure you don't fail. When others pulled back funding, we doubled down. We believed in you, in the work, and in the change we could achieve together." (See [Capacity Building section](#) for more information.)

Over time, grantees began to rely on the Trust's commitment to capacity building and ability to find technical experts who reflect their own communities, from evaluators to organizational development advisors. One technical assistance provider explained that there is now an expectation by many grantees that they can find expertise in people who look like them. "They not only expect that that's out there, they look to the Trust to identify folks with those skills," they explained.

The Role of Philanthropy

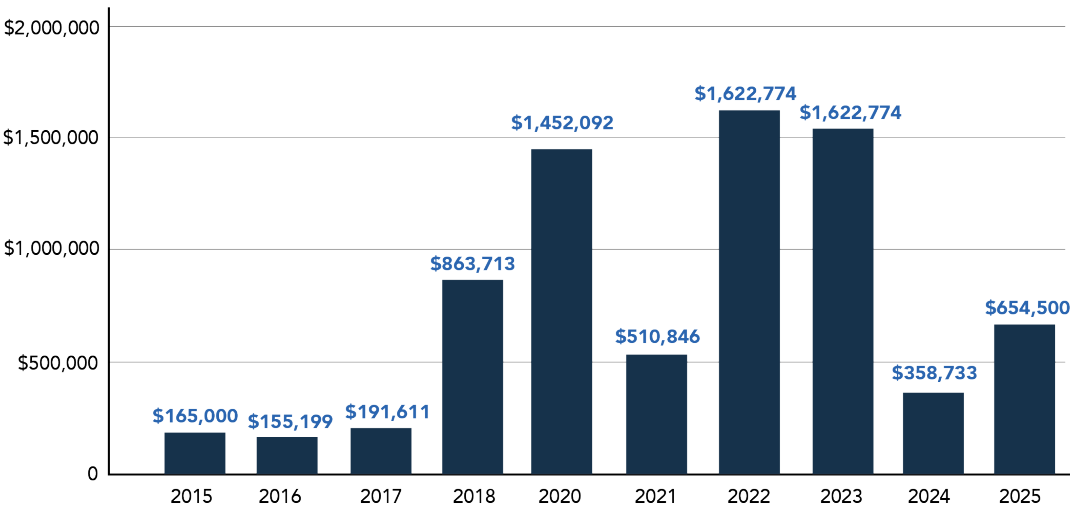
Addressing Power Dynamics

The Trust’s journey toward equity and systems change has required examining the role of philanthropy in holding power and wielding influence. As a result, the Trust has intentionally worked to flatten hierarchies

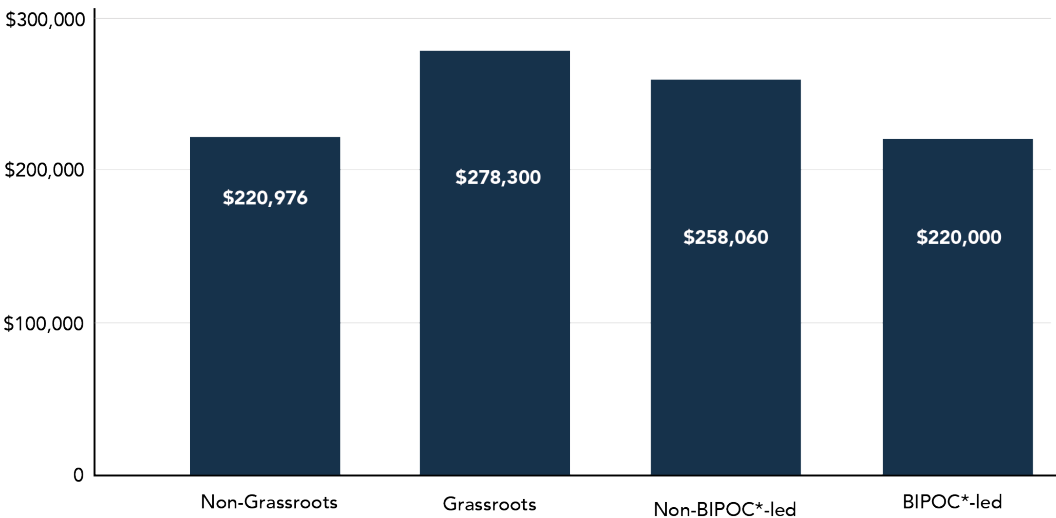
between funders and grantees, building relationships rooted in mutual trust. One grantee recalled an instance in a meeting where Thompson recognized her own influence could overshadow community voices. “She acknowledged, ‘I have outsized power here, and I need to take myself out of this space,’” they recalled.

The Trust has also leveraged its influence to confront inequitable power dynamics within grantee coalitions.

Great Expectations Funding Awarded to Grassroots Organizations (2015-2025)



Great Expectations Median Grant Size by Organization Type (2015-2025)



*Black, Indigenous, People of Color

In one instance, a male leader dominated a collaborative space that was otherwise led by women, attempting to advance his own agenda. After repeated attempts to intervene, the Trust ultimately shifted funding to other coalition partners. As one staff member recalled thinking, “The only way this will shift is if we remove the people who hold the most power out of that position—and the only thing we have is leverage.” The decision affirmed the Trust’s commitment to align its grantmaking with its equity values and demonstrated that accountability applies to all partners, regardless of position or influence. The staff member shared how that decision also sent a broader signal to peer institutions: “No one sitting in a leadership seat should assume they are the most knowledgeable person in the room or that they alone get to make decisions.”

Influencing the Broader Philanthropic Field

In shifting its focus toward racial equity and systems change, the Trust held up a mirror to philanthropy as a field. As one Trust leader reflected, “If we are going to be a continuing field, we are the only ones who can sustainably address systemic change. Shame on us for running from it.” By wrestling with this publicly, the Trust has helped to change the narrative among funders in Forsyth County.

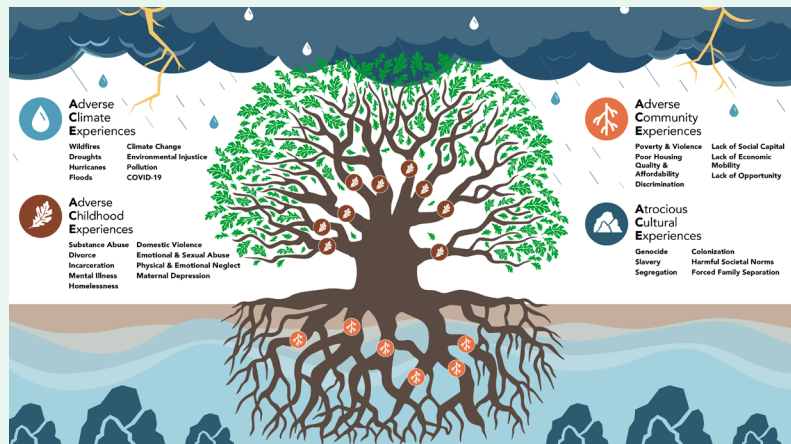
One technical assistance provider shared that the Trust’s integration of racial equity, transparency, and systems orientation is influencing philanthropic peers across North Carolina. “I don’t know all the foundations in town, but it feels like a number of them are singing from the same hymnal now,” they shared.

SPOTLIGHT

Supporting coalitions to address Adverse Childhood Experiences

The Trust’s early efforts to support collaboration among organizations addressing Adverse Childhood Experiences (ACEs) revealed just how challenging collective work can be. Many of the participating groups had long operated in competition for scarce resources, and this was their first attempt to work together toward a shared goal. What followed was a challenging but instructive process of learning to build trust and repair relationships. As one Trust staff member reflected, “What we did not recognize is the trauma that people had experienced around money. And while we were encouraging people to work together, we made sure that everybody had the money. Folks had never had to figure out, ‘What do we do if we have a disagreement? How do we work together?’ So we had to spend almost a year of a fully funded collaboration just helping them learn how to work together.”

In response, the Trust brought in facilitators to help partners navigate conflict, practice shared decision making, and rebuild trust. “We really just had to support and give people space to heal and say that we can work together and it’s okay to disagree,” the staff member explained. Finding the right balance of grassroots grantees and designing investments that minimize competition remains an ongoing challenge.



Adapted from North Carolina Partnership for Children image

The Trust's approach also garnered national attention. As mentioned earlier, the 75th anniversary event demonstrated the Trust's willingness to publicly reckon with its history and take action to repair past harms, sparking conversations beyond Forsyth County. The [Chronicle of Philanthropy](#) profiled the Trust alongside other foundations grappling with how to repair the harm caused by their wealth, citing the Trust's transparency and divestment strategy as an emerging model for institutional accountability. The article quoted Edgar Villanueva, CEO of the Decolonizing Wealth Project, who stated, "Changes in grantmaking

and investing like those made by the Kate B. Reynolds Charitable Trust are a way for foundations to get into a 'right relationship' based on respect for the nonprofits they support."

The Trust's journey has not been a linear one. It has surfaced tensions around power, competition, and sustainability that mirror the broader challenges of equity-driven philanthropy. Yet those tensions reflect the Trust's willingness to engage deeply, take risks, and evolve.

SPOTLIGHT

Centering wellness in the equitable birth outcomes project

The Forsyth County Birth Stories project, led by Boston-Thurmond United in partnership with Population Health Improvement Partners, revealed the importance of centering healing and wellness in community work. During one gathering, mothers began sharing their birth stories and reliving their trauma. Population Health Improvement Partners provided immediate support through a breakout room with a mental health provider who helped participants regulate their nervous systems and provided them with mental health resources. The experience was also deeply affecting for the Boston-Thurmond team. In response, Shenell McClurkin Thompson, Senior Program Officer Local Impact, worked with them to establish a long-term partnership with the mental health provider.



The experience became a turning point for the initiative and for the Trust's approach to technical assistance that centers community members. It led to the adoption of sustained wellness practices, including retreats and reflective spaces for both participants and staff. More broadly, it underscored a critical lesson: wellness must be treated as integral to equity work—especially when engaging Black and Brown women whose lived experiences often carry the weight of trauma. "I think it was the first time that I started thinking about how philanthropy could engage wellness as a part of the practice. It is not something that is an offset. As we say, we are working with people with lived experience," Thompson explained. By embracing a holistic approach, the Trust reframed wellness not as an add-on, but as essential to achieving lasting systems change.



Creating Conditions for Community-Driven Change

The Trust's institutional shift to racial equity and systems change enabled the foundation to be a funder and partner that creates the conditions for community driven change to thrive. The following section outlines Great Expectations' investments in community power-building, collaboration and networks, system and policy change, and capacity building.

Community Power-Building

Almost every evaluation participant reflected that Great Expectations supported initiatives are centering community members—mothers, childcare providers, community college students—in unprecedented ways. This shift is not something that can happen

overnight. The Spectrum of Family and Community Engagement for Educational Equity, a tool grounded in research on best practices in family and community engagement, names the importance of starting with “acknowledging marginalization” today, in order to move toward community ownership in the future.⁷ In standing up community-centered efforts through Great Expectations, an institutional partner reflected, “We really had to wrestle with the fact that we were not engaging families in a way that felt authentic or safe for them.” Through building and ceding power, Great Expectations' Initiatives are creating spaces where community members' most impacted can share their own stories and visions, and institutional leaders learn to move differently.

⁷ Padres Unidos and Rosa González. [Spectrum of Family and Community Engagement for Educational Equity](#). August 2021.

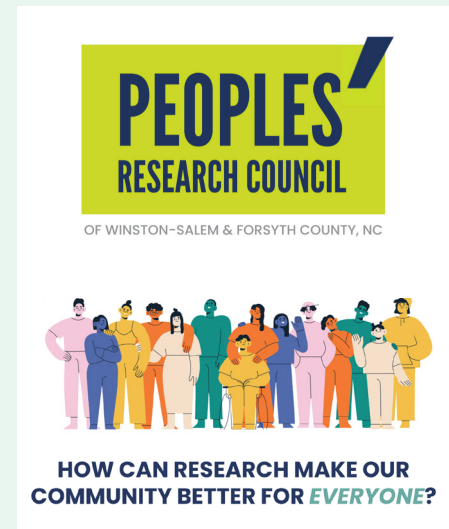
“As a result of the Great Expectations investment, there is a higher level of advocacy, a stronger sense of self-determination, and increased authentic community engagement within impacted communities.”

10-Year Evaluation Survey Respondent

SPOTLIGHT

Peoples’ research council setting up community members to lead

The investment that the Trust made in supporting co-creation between [Action4Equity](#) and [Forsyth Futures](#) planted the seeds for the partners to grow new community initiatives. In particular, the [Peoples’ Research Council](#) is a partnership between Action4Equity, Forsyth Futures, and people who call Winston-Salem and Forsyth County home. The council’s vision is “to transform the research culture in Forsyth County by fostering solidarity, raising awareness of systemic disenfranchisement, and empowering community-driven change.” Together, Action4Equity, Forsyth Futures, and other partner groups have built on the initial investment from the Trust to develop community-centered projects over the years: [Pre-K Parent Quality Standards](#) (2021), [By Mothers](#) (2022-2025), and [We Heal Together](#) (2023-2027).



Co-Creation Between Grasstops and Grassroots Organizations

Grass tops organizations are acknowledging that meaningful collaboration requires humility and genuine relationship-building with the community. As one grantee put it, “Power is now viewed less as control, but more as shared responsibility for outcomes, with success defined by both data and dignity.” The partnership between Action4Equity and Forsyth Futures was named as a powerful example of what is possible when this kind of partnership is done with intentionality.

Moving Differently Through Shared Values, Agreements, and Spaces

As early childhood care work in the county has shifted toward community-driven change and co-creation

between grassroots and grasstops organizations, organizational and operational practices have also needed to change:

- **Grounding in shared values and agreements.** Many partnerships launched through Great Expectations have established shared values, working agreements, and legal agreements on community ownership of the data and the project. For instance, the [Peoples’ Research Council](#) is grounded in nine guiding values, including community leadership, focus on direct impact, harm reduction, and cultural responsiveness.
- **Intentionally designing culturally responsive and accessible spaces.** Centering community means “meeting people where they are at,” as one interviewee put it, rather than asking them to go to places and spaces of institutional power. The Trust puts this into practice by hosting Great

Expectations meetings in community spaces in familiar neighborhoods, providing childcare, compensating caregivers for sharing their time and expertise, and providing translation and interpretation services.

"I have observed an awareness of poor practices that reinforce hierarchy and power and a genuine desire and steps to change to address the culture. One specific change we have observed is groups we have been in sought to create operational standards and values that reflect a desire for equity and stronger community voice."

**Grassroots Grantee
10-Year Evaluation Survey Respondent**

Moving from Ownership to Shared Stewardship

Over the past decade, Forsyth County's early childhood ecosystem has shifted from siloed efforts toward more coordinated, cross-sector collaboration.

Network initiatives directly funded by Great Expectations, such as the Pre-K Priority Committee and the By Mothers project, as well as initiatives that emerged from Great Expectations funding, including the Pre-K Model Cohort Classrooms supported by ARPA, demonstrate real momentum in aligning goals, data, and resources.

A fundamental value that the Great Expectations special initiative has brought to Forsyth County is in creating pathways to move away from siloed projects toward shared, cross-organizational efforts. One survey respondent noted the power of "making the Pre-K Priority a community-wide initiative, not an initiative owned by one agency or another." By bringing together childcare providers, higher education, family support programs, and local organizations, the initiative has reduced duplication of efforts.



“Forsyth County has experienced a noticeable shift toward deeper collaboration and stronger networks in the early childhood field. Organizations that once worked in silos are now actively aligning efforts, sharing data, and co-developing strategies to better serve children and families.”

10-Year Evaluation Survey Respondent

SURVEY SPOTLIGHT

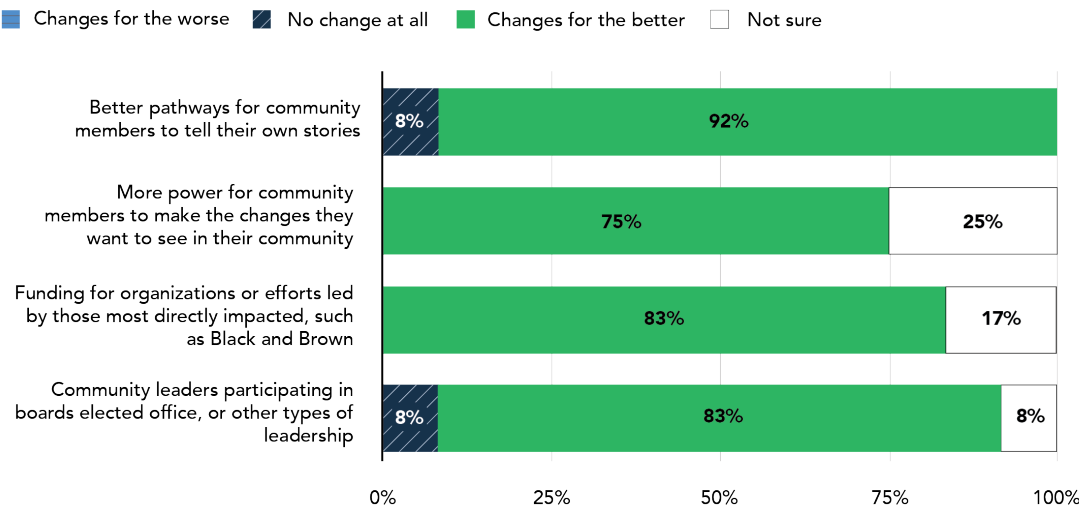
Better pathways for community members to tell their own stories

Over the past 10-years in Forsyth County:

- 92% of survey respondents observed better pathways for community members to tell their own stories.
- 75% of survey respondents observed more power for community members to make the changes they want to see, but there is some ambivalence, with 25% of respondents saying “Not Sure.”

10-Year Evaluation Survey on Community Power

In the past 10 years in Forsyth County, I have observed the following changes related to shifting power dynamics in the early childhood field. (n=12)



SPOTLIGHT

Investing in coalitions for the long game with Pre-K Priority

The Pre-K Priority was formed in 2014 as a coalition of education, childcare, and community leaders with the goal of providing every four-year-old in Forsyth County the opportunity to attend a high-quality Pre-K program. Research shows that the majority of brain development—from cognition to the ability to form social/emotional bonds with others—happens before a child enters kindergarten.



To build collective will toward universal access to high-quality Pre-K, the committee is composed of [diverse stakeholders](#), including parents, childcare center owners, and county health department leaders. During a focus group discussion, Pre-K Priority steering committee members expressed gratitude for the unique opportunity to collaborate across their different expertise toward a common goal. A childcare center owner shared with fellow committee members, “It feels really good to have people taking interest in what’s best for our community, even when our professions are in totally different fields.”

The Trust’s initial investment in the Pre-K Priority in 2014 has had a ripple effect, which included 2023’s ARPA-funded [Pre-K Model Cohort Classrooms](#) project serving approximately 400 Pre-K students, their families, and 60 Pre-K educators. As one committee member explained, “There are now relationships, understanding of what other organizations do, that weren’t there before. There’s a clear understanding of how to do things better, more community-led, with a racial equity lens. It’s been that investment that stays and will percolate across all sorts of other initiatives in the community.”

Signs of Success

These coalitions have successfully demonstrated the ability to build on the Trust’s initial investment and bring in new resources, particularly public resources for high-impact, collaborative projects, such as:

- \$4 million in American Rescue Plan Act Funding:** In 2023, Forsyth County Commissioners and the City of Winston-Salem approved \$4 million of American Rescue Plan Act grant funds to support increased quality standards in a model cohort of 30 Pre-K classrooms representative of the Pre-K landscape across Forsyth County.
- \$4 million in Substance Abuse and Mental Health Services Administration Funding (SAMHSA):** The We Heal Together Winston-Salem Initiative is a four-year collaborative community partnership between several Great Expectations’ grantees.

They include Action4Equity, Crossnore’s Center for Trauma Resilient Communities, and Forsyth Futures. The collaborative received \$4 million from SAMHSA’s Resiliency in Communities After Stress and Trauma program to assist youth and families through evidence-based violence prevention and community youth engagement programs.



Funding for Thoughtful Coalition-Building and Partner-Based Work

“Building rapport and respecting when you’re going too far is a really important thing. If it’s community-led, I can make suggestions, but I can’t decide.”

By Mothers Institutional Partner

Great Expectations directly funded networks advancing initiatives, compared to typical coalition-based work, which is often unfunded and completely reliant on volunteer time. Research on effective coalitions shows that funding for a coalition’s “overhead/capacity building can be even more difficult

to obtain than for individual nonprofit organizations.”⁸ Having direct funding for both the coalition work and for individual compensation supported new coalitions to start from a solid foundation.

For example, the grant for [By Mothers](#)—a collaborative research effort between community-based researchers and Atrium Wake Forest Baptist Health medical professionals—included stipend support for the Black mother community researchers and salary support for Atrium Health staff. The funding for the three-year effort enabled:

- Time at the beginning of the partnership to set working agreements and work through different perspectives.
- A dedicated, paid project manager for the initiative.
- A legal agreement to ensure the collaborative of community researchers owned the work and data, not the institutional partner.



⁸ Jared Raynor. [What Makes an Effective Coalition](#). TCC Group. March 2011.

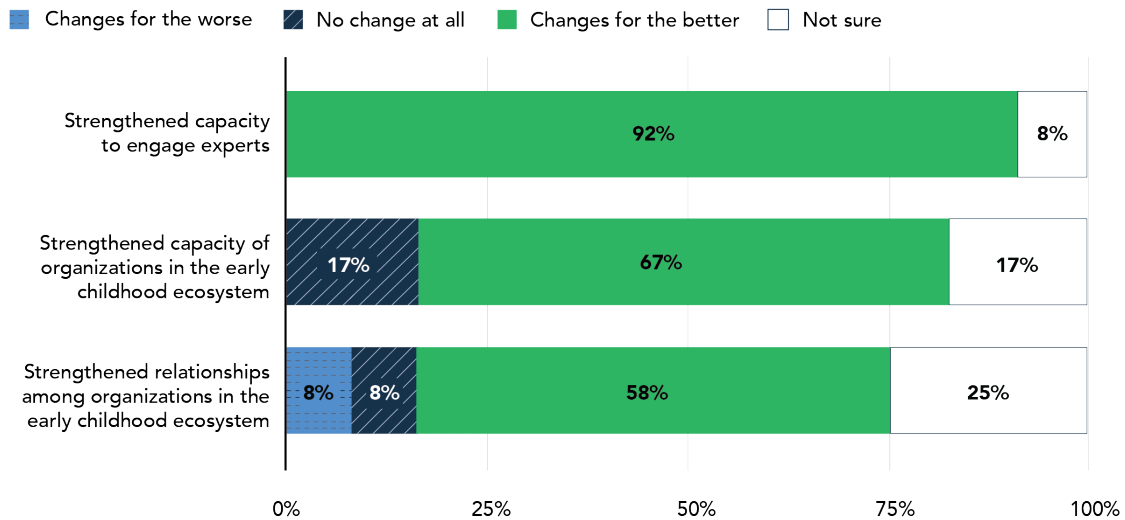
SURVEY SPOTLIGHT

Strengthened capacity to engage lived and learned experts

92% of respondents have observed changes for the better in strengthened capacity to engage experts, followed by strengthened capacity of organizations in the early childhood ecosystem (67%) and strengthened relationships among organizations in the early childhood ecosystem (58%). Importantly, survey respondents name in open-response that they are referring to both lived experts, such as caregivers with practical insights and solutions from navigating Smart Start, and learned experts, such as quantitative researchers who can develop data-driven messaging.

10-Year Evaluation Survey on Collaboration and Networks

In the past 10 years in Forsyth County, I have observed the following changes related to stronger collaboration and networks in the early childhood field.



Changing Narratives, Seeding Systems, and Policy Change

“Families and communities are being involved in the solutions and part of getting us to the system change. Communities being involved is system change.”

Community Researcher

With community leadership and collaborative efforts as the foundation, systems and policy changes have begun to take shape in the county. When reflecting on systems and policy changes in Forsyth County, participants named the power of “agencies and programs aligning around common goals and prioritizing *collective impact* rather than isolated achievements.” There is more work to be done to advance policy change at higher levels of government and power, but stakeholders expressed excitement about changing public narratives about early childhood education and achieving incremental policy changes that increase accessibility.

“My first and primary goal was that our community would never say ‘K through 12’ again, that they would really view education starting at birth. And that has shifted in our community. People talk about Pre-K now, they talk about the whole child from birth to past the time that they are in school.”

Pre-K Priority Committee Member

Systems change requires institutional leaders, families, and grassroots organizations, among others, to understand and shift the deeply held beliefs that shape their actions. In FSG’s [Water of Systems Change framework](#), this is considered “transformative change” which is often more implicit than things like policy change, but it shows up in our language and in what’s prioritized.

Since Great Expectations launched in Forsyth County, stakeholders have shared how formal and informal communication efforts during this time have shifted the community’s understanding of the importance of early childhood. In particular, the community-led efforts stemming from Great Expectations have elevated awareness of race and class disparities in early childhood. Through community-led research, both families and leaders are better informed on the ripple effect that missing out on high-quality early education has on a child’s life. An institutional leader reflected that there is now “more willingness and platforms around issues that were harder to talk about in the past regarding race and class,” thanks to the efforts under Great Expectations.

One parent researcher shared, “A fire was lit inside of me to understand that there are children who, because they did not get a sound, nurturing, culturally-affirming early education, the trajectory of their life was deeply impacted.”

Incremental Policy Changes Are Being Made to Increase Accessibility and Equity

By centering community needs and leadership, policy advocates intervene where families need it most. In the 10-years since Great Expectations was launched, some incremental policy changes include:





- Reducing barriers to enroll in Pre-K classes.** In 2022, through collaboration with the Winston-Salem/Forsyth County Schools (WSFCS) Director of Early Learning, the policy was revised to accept different forms of documentation such as health assessments, immunization records, religious documents, or other verifications of birth.⁹ WSFCS previously required an official birth certificate to register in Pre-K, which could be a barrier for families.
- Making it easier to understand and apply to Pre-K programs.** The Pre-K Priority Committee hosts a [website for Pre-K registration](#) that integrates Smart Start, Head Start, WS/FCS programs, and private-pay options. This simplifies access for families to understand the options for placing their children in quality early learning programs.
- Meeting students and families with trauma-informed behavioral guidance.** Over the years, community-led policy advocacy has amplified the racial inequities of disciplinary practices in school settings in Forsyth County. The 2025-2026 Winston-Salem/Forsyth County Schools Code of Character, Conduct, and Support outlines the importance of Social and Emotional Learning (SEL) and the elimination of K-3 suspensions, except for severe acts.¹⁰
- Engaging with unlikely partners at the Chamber of Commerce.** Pre-K Priority Members engaged with the Chamber of Commerce around supporting family-friendly policies, which included a Forsyth County Smart Start presentation to Chamber members. The Chamber has continued to encourage employers to implement more family-friendly policies around parental leave and childcare options.

⁹ [Preschool Application Information | Winston-Salem/Forsyth County Schools](#). Accessed November 13, 2025.

¹⁰ [Code of Character, Conduct, and Support | Winston-Salem/Forsyth County Schools](#). Page 32. Accessed November 13, 2025.

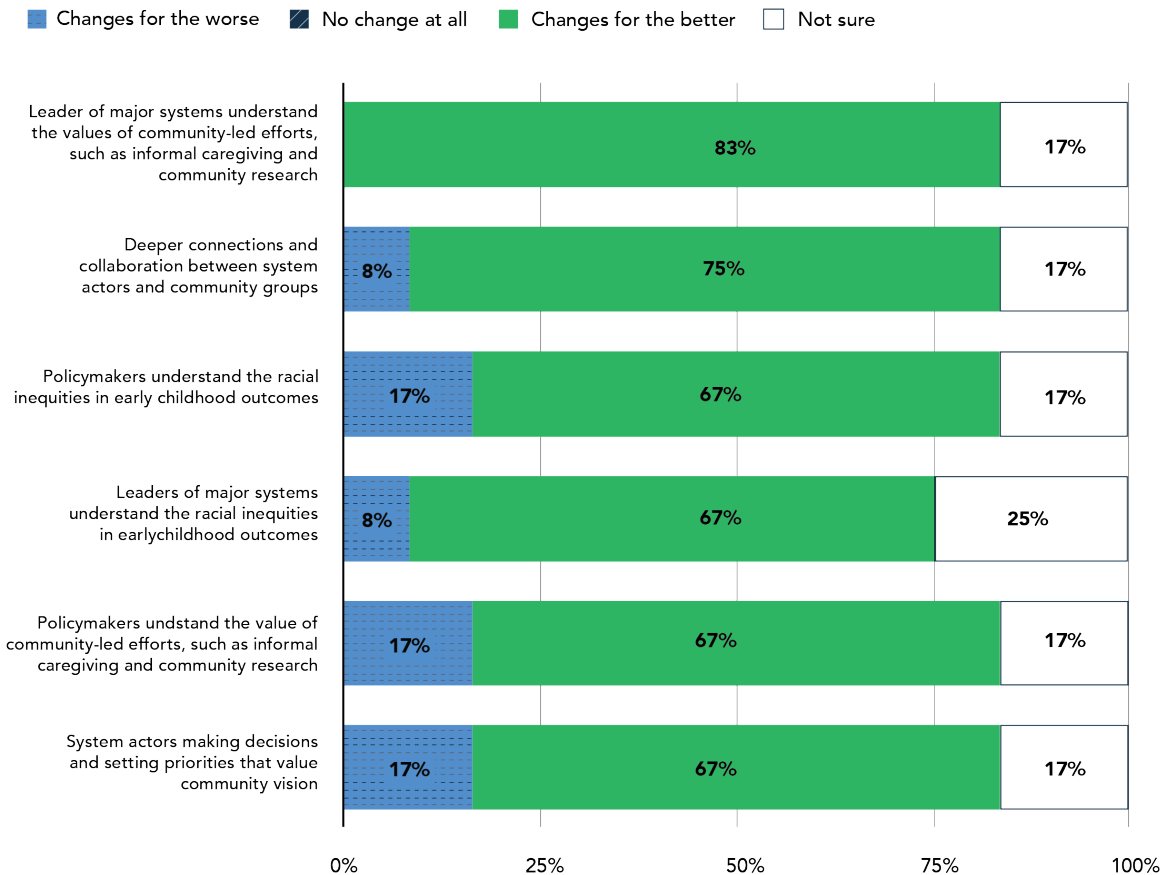
SURVEY SPOTLIGHT

Respondents are seeing change from systems leaders, and room to influence more change from policymakers

- Overall, survey respondents primarily observe changes for the better for systems and policy change.
- 83% of respondents have observed leaders of major systems like schools and hospitals understanding the value of community-led efforts, compared to 67% for policymakers.¹¹
- Respondents express the most ambivalence with respect to whether leaders of major systems and policymakers understand the racial inequities in early childhood outcomes, with 25% of respondents saying “Not Sure.”

10-Year Evaluation Survey on System and Policy Change

In the past 10 years in Forsyth County, I have observed the following changes related to system and policy changes in the early childhood field.



11 Note: Major systems were described as hospitals, K-12 schools, community colleges, etc. in the survey question. Policymakers were described as county commissioners, city government officials, etc.

Capacity Building: Leading with Rigor

Great Expectations investment in data infrastructure and evidence-building capacity was unique.

“The Trust’s communications and data investment has been huge and it’s not something I’ve seen before. The resources are used all the time. We have to be able to evaluate what we’ve set out to do to tell the best story. It was forward-thinking.”

Focus Group Participant

In interviews and focus groups, participants emphasized the value of both well-planned capacity-building support and being responsive to real needs as they emerged. The Trust planned ahead for support from experts in using data for learning and storytelling.

For example, [KPLLC](#), an evaluation, wellness, and strategic consultation firm, supported grantees in clarifying their long-term vision and identifying indicators of progress toward that vision.

And, as projects and partnerships unfolded, new needs and opportunities emerged. In response to grantee interest in additional support using data, the Trust developed a Community Data and Learning Cohort where participants gained opportunities to co-design data tools, network with peers doing similar work, strengthen their data skills, develop shared language across issues, and receive tailored TA.¹² In addition, the Trust organized data in an easy-to-access [Data Resource Library](#) to help amplify collaboratively produced data publicly for shared learning.

Looking toward what comes next, survey respondents highlighted the need for long-term support in data driven decision-making to sustain progress and build lasting systems change. In particular, one grantee expressed the importance of “data systems for measuring long-term family outcomes” to strengthen their sustainability and evidence-based advocacy.



¹² The Community Data and Learning Cohort also included grantees funded outside of the Great Expectations Initiative.

SURVEY SPOTLIGHT

Capacity building is important to grantees

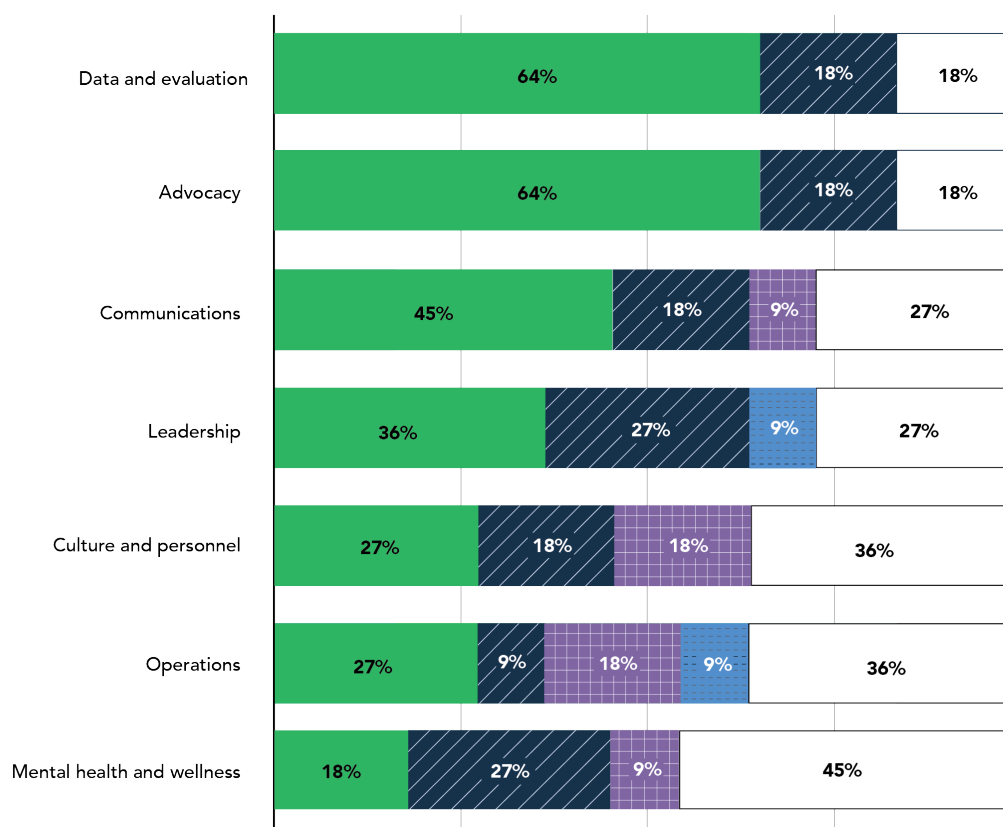
Great Expectations funding has been most important to helping survey respondent organizations build their capacities in:

- Data and evaluation (64% say extremely important).
- Advocacy (64% say extremely important).
- And communications (45% say extremely important).

10-Year Evaluation Survey on Capacity Building

Please share how important funding from the Great Expectations initiative has been to help your organization build the following capacities:

■ Changes for the better
 ■ Moderately Important
 ■ Low importance
 ■ Not at all important
 ■ Not applicable





MDC and Kaleidoscope Pathways' support helped facilitate productive and thoughtful collaboration.

"MDC and Kaleidoscope Pathways both helped us transition from a community initiative into a recognized anchor organization with the structure, voice and strategy to influence systems change."

**Grassroots Grantee
10-Year Evaluation Survey Respondent**

MDC, which served as the "activating agency" of Great Expectations, and Kaleidoscope Pathways together supported grantees with organizational capacity building, such as clarifying strategy and approach and developing a logic model. In certain cases, they supported organizations to build their strategic and systems influence, such as supporting a grassroots grantee to "transition from a community

initiative to a recognized anchor organization capable of influencing systems change."

In focus group discussions, participants shared how valuable MDC's role was in facilitating hard conversations and moving through conflict. Research on what makes coalitions effective emphasizes that "focusing on conflict management is an essential cultural characteristic of an effective coalition."¹³ Importantly, the goal is not to prevent conflict, but to productively move through it. MDC's role struck an important balance between having an understanding of the early childhood field in Forsyth County and being removed enough from funding decisions to create safe spaces for disagreement and conflict.

As mentioned earlier, coalition partners addressing ACEs faced many challenges, including aligning around their curricula and project approach. As a result, MDC developed a community of practice to productively learn from their different approaches, and facilitated tough conversations and interpersonal conflict. In another coalition, a childcare center owner shared how effective it was to have "MDC come in and facilitate meetings where there may be tough decisions, around a budget or teacher bonuses. It was nice to have facilitators to come in and help guide us."

¹³ Coalition Conditions for Success. Public Welfare Foundation. May 2025.



Community Outcomes and Signs of Progress

"Great Expectations has served as a transformative force in the community by fostering hope, resilience, and opportunity. Community members report feeling more empowered to set and achieve personal and professional goals."

10-Year Evaluation Survey Respondent

With the Trust's intentional investment in community power to drive systems change, Great Expectations grantees have produced measurable change across Forsyth County in the form of community leadership, institutional culture shifts, and tangible improvements in how families experience early childhood systems. According to the 10-year evaluation survey data, 83% of respondents identified Great Expectations as "extremely important" to providing access to trauma-informed support, 75% for access to culturally competent care, and 75% for family-centered approaches.

This section synthesizes outcomes, highlighting stories of progress across the five key components of the Great Expectations special initiative: maternal and infant health, adverse childhood experiences, high-quality Pre-K, informal caregiving, and family advancement.



Maternal and Child Health: Mothers Leading the Way

Through the [By Mothers](#) at Atrium Health Wake Forest Baptist, facilitated by Dr. April Miller and Dr. Kathy Poehling, mothers themselves became certified researchers, trained through the [Collaborative Institutional Training Initiative](#), to conduct formal, ethics-approved research.

By embedding lived experience directly into the research process, the mother researchers were able to recruit and build trust with over 200 mothers in Forsyth County to create their [community report](#) of experiences and recommendations. After sharing the research back with participants and celebrating their hard work, the By Mothers researchers presented to the local health department and leaders from Forsyth County's two major hospital systems. Institutional partners emphasized the importance of flipping the script in these meetings, guiding institutional leaders to show up as "a learner and not a leader." As a result of the community-led research process, Atrium Health Wake Forest Baptist's birth center integrated new education on racial disparities and patient respect into its standard curriculum.

The work has drawn national attention and interest from other hospitals seeking to replicate the model. During the American Academy of Pediatrics' National

Conference in Hawaii, two of the participating mothers co-presented their research and "got a lot of input from people all around the nation interested in doing similar community-based research," with attendees asking "how they can replicate it throughout the country."

Within Atrium Health Wake Forest Baptist, the initiative catalyzed measurable shifts in institutional practice. Institutional partners observed "changes within leadership at the hospital on how to treat parents and patients with respect. Understanding disparities and power dynamics exist. Especially how [my] colleagues have changed their approach." Concrete changes include integration of health disparities into the birth center education series that Dr. Poehling runs—now a standard curriculum for all birth center staff. Hospital leadership initiated workshops and internal sessions to address and ideally eliminate disparities within the institution. In addition, stakeholder meetings now involve both Atrium Health Wake Forest Baptist and Novant Health, the county health department, and community programs.

According to one grantee, "Great Expectations created a culture shift among organizations working with or on behalf of community members to truly center the needs and voices of the community. Great Expectations programs also directly uplifted and centered the stories from those who are marginalized by, and excluded from, our systems."

The By Mothers project demonstrates that when healthcare institutions meaningfully partner with Black mothers—not as research subjects but as certified researchers—the result is both more respectful care and a fundamental redistribution of research power, contributing to more sustainable, long-term systems change.

Adverse Childhood Experiences and Toxic Stress: Culturally Accessible Learning

“Everything that we did in the Latino community originated in their native language. So from training, from surveys, every aspect was in their native language.”

Great Expectations Grantee Focused on ACEs

Adverse Childhood Experiences (ACEs) are potentially traumatic events that occur in childhood, like experiencing or witnessing violence, abuse, or neglect. Research shows that ACEs are associated with increased risk for conditions including heart disease, diabetes, obesity, depression, and substance abuse. Given the impacts of ACEs on school readiness and lifelong health outcomes, the Trust prioritized addressing ACEs and toxic stress. Great Expectations funded partners advanced trauma-informed approaches that centered cultural accessibility, relevance, and local community leadership. The Spanish-First Community Research events, led by Love Out Loud and their Director of Strategic Initiatives, Tonya Monteiro, became a model for inclusive design. From their initial training to data collection, every stage of the research was conducted in Spanish.

These initial efforts inspired a follow on community-led project: Sustenado Forsyth Latine (*Nourishing Forsyth*

Latine), a community-led survey designed to assess awareness of ACEs, toxic stress, and trauma in Forsyth County’s Latino community. Conducted in 2025, the survey found that 61% of Latine respondents reported one or more ACEs, like loss of a parent or physical and sexual violence, while nearly one-third also experienced immigrant-related ACEs, such as family separation or deportation risk.¹⁴ This prevalence rate aligns with national data showing that Latino children experience ACEs at rates comparable to or higher than the general population, with immigrant-specific stressors compounding traditional ACEs exposure.¹⁵ The research identified specific cultural stressors unique to the immigrant communities that traditional ACEs screening tools and processes miss.

The Sustenando Forsyth Latine project represents a significant advancement in community health knowledge. By conducting research entirely in Spanish and centering the lived experiences of Latino community members as co-researchers, the project created baseline data where little existed previously, identified immigrant-related ACEs as a distinct category requiring attention, built trust between researchers and historically underserved communities, and provided actionable findings for trauma-informed programming.

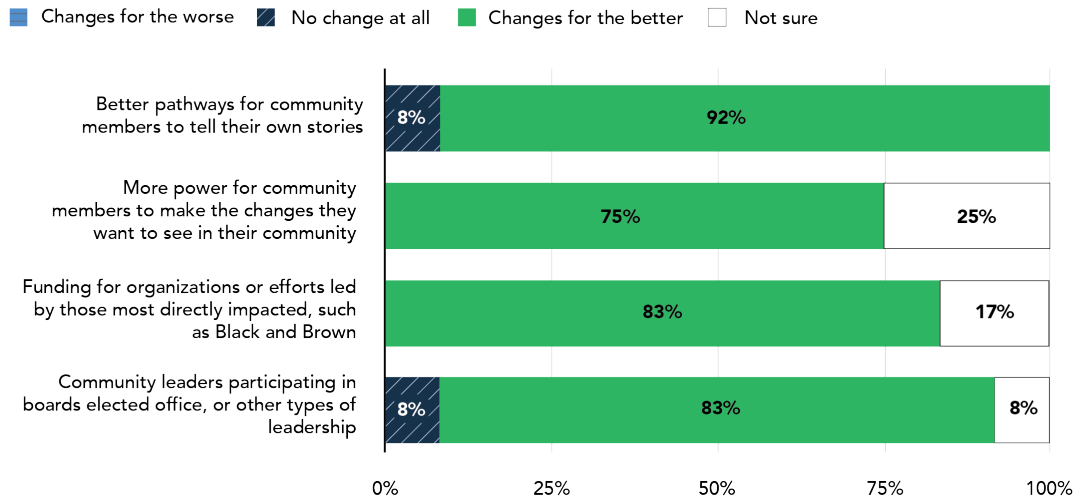


14 [Nourish Forsyth Latine Report](#), 2025.

15 Bethell, Christina D., et al. [Methods to Assess Adverse Childhood Experiences of Children and Families: Toward Approaches to Promote Child Well-being in Policy and Practice](#). Academic Pediatric Association. 2017.

Discipline Referral Risk Ratio Data from Forsyth Family Power¹⁶

In the past 10 years in Forsyth County, I have observed the following changes related to shifting power dynamics in the early childhood field. (n=12)



These projects connected trauma research with cultural awareness and policy influence. Some participants of the Spanish-first events were members of the local school boards, directly hearing from families, which contributed to Forsyth County's school board trauma-resilience practices. At a systems level, these efforts represent a clear sign of community change: new, firsthand knowledge emerging from within the community, attracting renewed policy attention, empathy, and boosting trust and connectivity across languages and cultures. 10-Year Evaluation survey respondents noted the broader impact: "Great Expectations provided an opportunity for community members to acknowledge and address trauma, which is foundational for individual and community healing."



Reducing Bias in Early Education through Data-Driven Changes

Building Infrastructure for Universal Pre-K

Great Expectations reshaped Forsyth County's early learning infrastructure through coordinated investments in data capacity, collaboratives, communications, and development of culturally and restorative justice-aligned standards. Through Family Services of Forsyth County, the Pre-K Priority Committee, and collaborators like Action4Equity, these initiatives invested in building a shared evidence base to inform universal pre-K planning—an achievement one Pre-K Priority leader highlighted as "harnessing and synthesizing data" to consolidate disparate information on four-year-olds and validate community insights. 10-Year Evaluation survey respondents echoed this impact, noting a countywide increase in awareness of the importance of high-quality early childhood education and a newly "connected and collaborative early childhood ecosystem" grounded in shared goals.

As mentioned, the initiatives also achieved remarkable success in mobilizing public funding, particularly the two-year grant from the city and county that added up to \$4 million for Pre-K work through ARPA funding. A Great Expectations grantee involved in the ARPA-funded project explained the strategy: “The seed money that the Trust has provided has allowed us to access much larger funding sources, and to start to influence the public funding streams. ARPA dollars were temporary, but that has positioned us well to go back to the county and also advocate to the state to get increased dollars for the Pre-K system.”

Keeping Kids in School Through Policy Change

One of the most significant unanticipated outcomes that emerged from trauma-resilience work connected to Great Expectations was the change in school discipline policy that is now reducing exclusionary practices. Data from Winston-Salem/Forsyth County Schools shows that Black students were three times more likely than white students to be referred for an incident, while Hispanic/Latino students were nearly twice as likely than white students in the 2024-2025 school year.

These stark disparities, combined with community organizing led by Action4Equity and other Great Expectations-funded partners, along with trauma-resilience training, equipped leaders and educators with concrete alternatives to punitive discipline. Action4Equity documented discipline disparities and organized coalition partners and parents to demand change, using community-informed data to make the case for restorative practices.

As a result of the conduct policy changes in 2023,¹⁶ Great Expectations grantees share that “there has been a huge reduction in out-of-school suspensions for children in elementary school.” Forsyth Family Power cites data indicating a 49% drop in K-3rd grade out-of-school suspensions in 2025 for Black boys, the group



with the highest instances of out-of-school suspensions in the 2024 school year.¹⁸ Multiple grantees surveyed identified the Student Code of Conduct revision as a major policy victory directly connected to Great Expectations’ investments in trauma-resilience training, community organizing, and coalition-building.

Informal Caregiving and Family, Friend, and Neighbor Care

“Even though there is awareness, it still takes time to make changes and change perceptions about the value of family, friend, and neighbor care and the resources that are needed to support these individuals.”

Katura Jackson
Executive Director
Child Care Resource Center

¹⁶ [Forsyth Family Power Community Data](#). Accessed November 13, 2025.

¹⁷ [Code of Character, Conduct, and Support | Winston-Salem/Forsyth County Schools](#). Page 32. Accessed November 13, 2025

¹⁸ [Forsyth Family Power Community Vision](#). Citing School Justice Partnerships’ [Datapalooza 9-29-2025 Data Slides and Context](#). Page 12. Accessed November 13, 2025.

The Invisible Workforce

One of Great Expectations' most far-reaching impacts has been bringing visibility to the informal care network supporting most young children in Forsyth County." In 2025, we will have 25,000 children, ages birth to five, in our community. We have 5,000 licensed child care spaces," explained Katura Jackson, underscoring how the formal care infrastructure cannot meet the demand for quality childcare.

This means thousands of children and their families will rely on care arrangements outside the licensed system, with the vast majority cared for by family, friends, and neighbors (in unlicensed settings). These FFN caregivers provide more than just a stopgap solution. Research by the Duke Center for Child and Family Policy shows that home-based child care "is the most common care arrangement for children in North Carolina." The research showed that informal care arrangements often offer culturally responsive, linguistically appropriate, and relationship-based care that families prefer, particularly in communities of color and immigrant communities where trust, cultural values, and flexible scheduling are paramount.

Yet these caregivers are largely invisible in policy conversations and ineligible for support systems available to licensed providers. "None of the programs in North Carolina that support child care support family, friend, and neighbor care or unlicensed care," Jackson explained "They can't be a part of the food program. They can't necessarily be provided with any other subsidy programs that might be available."



Before Great Expectations funding, FFN care was dismissed in policy spaces. "People didn't talk about family, friend, and neighbor care or FFN in our community until we started this work. And now it seems that sometimes I'm in a meeting, be it on a state level or on a local level, where people are saying the word FFN," Jackson recalled. Great Expectations sustained support allowed the Child Care Resource Center to provide play-and-learn groups using [Kinder Musik](#) and [Kaleidoscope](#) curricula in community settings, reach caregivers in Cleveland Avenue Homes, Boston-Thurmond, and other underserved neighborhoods, to offer training and professional development for unlicensed providers, and build connections with local institutions.

Seventy-five percent of survey respondents identified Great Expectations as "extremely important" for family-centered approaches supporting caregivers and young children, and 58% said it was "extremely important" for support of informal caregivers. As one survey respondent explained, "Service delivery for families and caregivers is needed as early childhood programs continue to close in our community. Systems change efforts are still needed at both the state and local levels."

Organizing FFN Caregivers as Advocates

An unanticipated but powerful outcome was the formation of an FFN caregiver advocacy group. "Some of the family, friend, and neighbor caregivers wanted to learn more about how to advocate for themselves, and so now they have an advocacy group that they've created where they're working on learning more about advocacy and how they can advocate with their local leaders as well as state legislators," explained Jackson.

One survey respondent noted, "We have also created a stronger collaborative effort among organizations working with FFN populations. We have a common focus and organizations actually connected with us to determine how they can be involved in the FFN work." Another survey respondent stated that there is "more respect and interest in the work that we are doing with FFN providers. We are seen as leaders in the FFN space. People are listening to the statistics that we share and are asking us for data related to the early childhood education space."



Great Expectations resources enable intensive policy advocacy efforts, including the formation of the FFN caregiver advocacy group, documentation of FFN care prevalence and needs, development of policy proposals for state and local lawmakers, and sustained engagement with county commissioners and state legislators to advocate for inclusion of FFN caregivers in subsidy programs, food assistance, and professional development funding streams.

On September 15, 2025, the Mayor of Winston-Salem issued a [proclamation](#) recognizing FFN care. Jackson described the moment: “Yesterday, we got a proclamation from the mayor. It was good to be in front of the City Council to talk, for them to hear the proclamation and for us to be able to talk a little bit about what family, friend, and neighbor care is.”

Building Community Power, One Block at a Time

“It was just powerful to see that they knew then that they could do this themselves. They didn’t have to wait for someone on the outside.”

Paula McCoy, describing the Castle Heights Organizing

Partnership for Prosperity

From Exclusion to Self-Determination

The Trust’s investment in family economic stability reflects a fundamental understanding that “we cannot ensure that children are healthy and ready to learn if their families are struggling,” as an evaluation interviewee put it. One of the clearest signs of community power emerging from this two-generation approach appeared at the neighborhood level, where residents shifted from being primarily service recipients to becoming self-determined organizers and changemakers.

After being excluded from a city-run home repair program, Castle Heights residents, supported by Great Expectations-funded training and organizing, formed their own initiative to rehabilitate 25 homes. Paula McCoy explained that Castle Heights is, “a neighborhood of homeowners, predominantly. Seventy-five percent of the people there were homeowners, but they were in a neighborhood that was excluded from some resources that the city could provide, like a program that would help them repair their homes. This neighborhood was excluded from that because their income levels were a little bit higher. It went over the threshold for qualifying.” Rather than accepting exclusion, residents organized their own solutions.

“This neighborhood came up with their own home repair program, and they fixed [or] repaired 25 houses in their neighborhood as a result of the funding that we got from Great Expectations,” McCoy explained. “They used that money, they did all the work, (but not physically), they contracted with the builders, contractors who did that work—they took that on themselves.”

The home repairs weren't just about fixing roofs or foundations, they were about creating conditions where children can thrive. The Castle Heights victory demonstrates how family economic stability investments directly support early childhood outcomes while simultaneously building economic power and self-determination.

From Fear to Collective Action in Salem Gardens

Similar to the Castle Heights neighborhood, Salem Gardens is a multi-family housing community, where residents face the additional challenges of being renters navigating neglect and dangerous living conditions. McCoy described Salem Gardens as "A neighborhood that was really oppressed by management, a lot of fear, a lot of intimidation from management because people didn't want to be evicted in an environment where we're having a housing crisis." She said residents were living with "mold, inhuman housing conditions," and experienced a lack of access to their own community center.

Through sustained organizing and advocacy support from Partnership for Prosperity, residents achieved concrete victories. "Through them continuously putting forth their views and voices about the things that they needed for their community, we finally had some victory," McCoy reflected. The apartments were rehabilitated through a formal program addressing

dangerous conditions. Residents gained access to their own community center and now run after-school programming in that space. Residents also formed a Tenant Association, creating formal structure for collective voice and ongoing advocacy.

Beyond immediate material improvements, residents built durable leadership capacity. They were trained as facilitators for their own study circles, learned grant writing and successfully secured funding from another organization, and became "co-designers, advocates, and leaders shaping the priorities and strategies that affect their families." As a survey respondent from Partnership for Prosperity shares, "Residents are no longer just beneficiaries of services, they are co-designers, advocates, and leaders shaping the priorities and strategies that affect their families. The power dynamic evolved from top-down funding and programming to reciprocal partnerships built on trust, accountability, and mutual learning."

These efforts improved housing conditions, increased resident engagement, and strengthened basic organizing infrastructure. But there were also unanticipated outcomes, including a complete shift from institutional-led to resident-led program design and implementation, the formation of sustainable resident leadership structures such as the Tenant Association, residents successfully writing grants and securing additional external funding, and residents becoming recognized partners at policy tables with philanthropic, education, and health system leaders.







The Path Forward

"A fire has sparked in our community. I see people jumping into the fight, regular community members like myself who were brought into the fight, and now I'm in this fight to the end now."

Community Researcher

As the Great Expectations Initiative comes to a close, the Trust has an opportunity to build on the lessons and successes of the initiative and deepen its impact on Forsyth County's early childhood ecosystem. Across surveys and interviews, respondents emphasized the importance of sustaining community-centered approaches, building policy and advocacy capacity, and maintaining long-term investments in equity, infrastructure, and collaboration.

Sustain Community-First and Equity-Driven Approaches

Grantees consistently called for continued investment in resident leadership structures. By maintaining a community-first approach, the Trust can advance equity, foster shared ownership, and ensure community buy-in and stewardship of solutions. Specifically, the Trust should:

- **Invest in family and resident leadership** through stipends, leadership development, and supporting advisory bodies that shape local policy and practice.
- **Strengthen infrastructure and capacity** for organizations to collaborate and establish shared goals, sustain cross-organizational collaboration, and integrate data-driven decision-making.
- **Recognize Family, Friend, and Neighbor caregivers** as critical to the ecosystem and sustain support for their professional development and connection to resources.



- **Link investments in early childhood development with broader systems**, such as housing stability, food security, workforce participation, and transportation access, to support children's success as they continue to grow.

Direct Investment in Early Childhood Infrastructure and Workforce

Grantees strongly recommended that the Trust continue making direct investments in early childhood centers and educators, recognizing that stable, well-resourced environments and a supported workforce are essential to quality and equity. Specifically, the Trust should:

- **Strengthen centers as anchors of quality.** Early childhood centers serve as the backbone of the local early learning ecosystem. Yet many operate with limited budgets, outdated facilities, and underpaid staff. Targeted grants could help centers upgrade classrooms, enrich curricula, and improve outdoor learning spaces.
- **Build workforce capacity and retention.** Respondents emphasized the need for sustained professional development and coaching, particularly in evidence-based frameworks like the Pyramid Model for social-emotional learning, to help educators manage complex classroom

dynamics, reduce burnout, and improve outcomes for children and families.

- **Provide flexible, accountable support.** Grantees emphasized the importance of unrestricted and capacity-building funding, which enables centers to address local needs while maintaining transparency.

In addition, the Trust should consider leadership-pipeline development and dedicated coaching to ensure continuity of vision and capacity among both organizational and resident leaders.

Continue Building Policy and Advocacy Capacity

Grantees and partners agreed that direct service alone is insufficient to address the structural barriers that shape early learning outcomes. As the Trust continues to evolve from programmatic funding to systems and policy transformation, building sustained policy and advocacy capacity across the early childhood ecosystem is essential. Specifically, the Trust should:

- **Strengthen advocacy skills and strategy.** Many grantees have gained organizing and communications experience through Great Expectations but seek further support to engage effectively in policymaking spaces. By investing in training, coaching, and peer-learning opportunities focused on advocacy strategy, data use, and policy analysis, the Trust can help

organizations and residents translate their lived experiences into actionable policy priorities.

- **Scale local insights for state-level impact.** The Trust can continue connecting local innovations to statewide systems and leverage its credibility and networks to amplify those lessons. There are already strong models for coalition-building and advocacy in Forsyth County that could inform broader state efforts in childcare access, workforce development, and family support. Expanding this work could include:
 - Supporting coalitions and alliances that advocate for equitable early childhood policies at the state level.
 - Investing in policy research and communications that lift up community-driven solutions.
 - Convening cross-sector partners to align advocacy efforts across education, health, and family economic stability.

By strengthening advocacy capacity and linking community experience to state-level policy, the Trust can help ensure that Forsyth County's progress contributes to broader, systemic change in North Carolina.



Foster Funder Collaboration and Long-Term Sustainability

Stakeholders consistently emphasized the importance of sustained, long-term investment rather than short-term cycles. According to survey results, 91% of respondents believe it is “extremely important” for the Trust to focus its future efforts and investments in early childhood on the sustainability of organizations in the early childhood field. “We’re just in a really dark time. Philanthropy is essentially our only hope right now to get us through these political times,” one grantee shared. Specifically, the Trust could:

- **Extend funding commitments** beyond three years to reflect the time needed for systems change.
- **Provide unrestricted funding** and capacity-building support to enable sustainability.
- **Partner with other funders** to align funding streams, ensuring the work is fully resourced and organizations have the capacity to sustain results.

Sustained investment would allow grantees to plan strategically, strengthen organizational capacity, and maintain community trust.

Strategic Planning

Stakeholders expressed appreciation for the Trust's honesty about the limits of the original Great Expectations' goal but urged greater clarity on what's next. Specifically, the Trust could:

- **Continue communication around the Great Expectations sunset.** The Trust should continue to communicate the sunset process transparently while defining its future priorities and boundaries. This includes articulating:
 - What areas of early childhood and family well-being remain central to its strategy.
 - How systems-change investments will evolve beyond Great Expectations.
 - The extent to which flexibility and nimbleness can be maintained post-sunset.

- **Refine strategic focus.** The Trust's broad work across health, education, and family economic security has created meaningful connections and learning. The next step is to identify where deepened investment could have the most sustained impact. Doing so would enable the Trust to align resources, strengthen internal coherence, and communicate a clear long-term vision for advancing equity and systems change in Forsyth County.
- **Plan for leadership continuity and succession.** The alignment between Dr. Gerald's equity-centered leadership and Thompson's trusted, community-grounded role has been a cornerstone of Great Expectations success. This partnership has demonstrated how institutional leadership and community credibility can mutually reinforce one another. To maintain this momentum, the Trust should plan proactively for leadership transitions, both within the organization and among key partners, to ensure continuity of vision, relationships, and community trust. Succession planning should prioritize:
- **Embed equity leadership at all levels** to ensure future leaders share the same commitment to transparency, accountability, and community partnership.
- **Develop internal talent pipelines** to reflect the diversity and values of Forsyth County.
- **Strengthen external relationships** to preserve the trust and credibility the Trust has built within the community.

By investing in thoughtful succession planning, the Trust can protect and extend its legacy of equity-driven philanthropy, ensuring its systems-change work remains consistent and credible through future transitions.

Conclusion

What Was Achieved

The Great Expectations Initiative catalyzed a series of interconnected successes that marked a decade of meaningful systems and community change. Maternal health programming shifted research power to Black mothers and influenced hospital practice. Trauma and ACEs work built culturally rooted data and expanded community voice. Early childhood investments produced significant policy changes that leveraged millions in public funds, and reduced exclusionary discipline tactics. While FFN caregivers gained long-overdue visibility and neighborhoods were empowered to organize and challenge exclusionary policies at the municipal level, these outcomes did not emerge in isolation. They are deeply interconnected.

The trauma-informed training that led to elimination of K-3 suspensions was grounded in culturally responsive research. The data capacity built through the Pre-K Priority Committee informed not only education policy but also the feasibility studies that shaped FFN support strategies. According to the survey, 92% of respondents observed strengthened capacity to engage experts, 83% saw increased funding for efforts led by those most directly impacted, and 75% witnessed more power for community members to make changes they want to see.



While Forsyth County continues to face persistent inequities in health and education, the Great Expectations special initiative's most enduring impact may be the infrastructure of community leadership, visibility, and empowerment it leaves behind. Through flexible funding, authentic trust-based partnerships, and sustained emphasis on resident power, the Great Expectations Initiative has shown that systems change is not only possible, but that it is already underway in the voices and actions of the community itself.

Moving Forward

As the Trust sunsets Great Expectations after 10-years, they are not shutting the door, they are opening new ones. They are moving much of the Great Expectations work into the larger Local Impact in Forsyth County program area, with a focus on building a more inclusive economy. Specifically, they are working to foster economic mobility for those too often denied opportunities in Forsyth County by addressing root causes of inequity.

This work not only furthers the Great Expectations mission, but is also necessary to build a community where all families can thrive economically, so that children can thrive as well. The Trust knows changing systems and working for racial equity requires maintaining a deep connection to community. As a result, they have made a commitment to continue to collaborate, listen, and learn together with community to create systems-based solutions that create opportunities for all residents.

"One of the things that we have been true to is the mission of the Trust, and that is to improve the quality of life for folks who are experiencing poverty in Forsyth County. I don't know how you fulfill that mission without a continued emphasis on our youngest residents."

Dr. Laura Gerald

President

Kate B. Reynolds Charitable Trust



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Appendix

Appendix 1: Protocols for Frontline-Collected Data

[Survey Protocol](#)

[Interview Protocol](#)

[Grantee Focus Group Protocol](#)



Thank you for helping children and families succeed.

Kate B. Reynolds
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