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Investing in Early Childhood

Impacts and Lessons from Headwaters Foundation's
Work with Montana Communities





DEAR READER,

If you are connected to early childhood work in Montana, you know it doesn't fit neatly into a spreadsheet or a tidy set of outcomes. The real story is one of relationships: in long meetings where people keep coming back even when the work feels slow, in the parent who finds their voice after being invited into the conversation, and in the nonprofit leader who no longer feels like they're carrying the weight of the system alone. That kind of change can be difficult to measure, but you can feel it when you're in the room.

This evaluation is the culmination of six years of investment in community-led early childhood work across Western Montana. While the pages that follow document strategies, outcomes, and lessons learned, we want to emphasize the human side of this work — parents, caregivers, Tribal partners, service providers, educators, and advocates coming together to ask big questions about what families need and how to build something better together. Over time, their collective efforts have strengthened relationships, deepened coordination, and elevated local priorities in broader conversations about early childhood across the state.

As the funder, we trusted communities to develop their own vision and strategies for this work. The effort was iterative by design, shaped by local context and adapted over time as relationships deepened and conditions changed. There were learning curves for our partners and us, along with moments of tension and uncertainty. But our mutual willingness to listen, adapt, and stay in relationship created space for experimentation, and for leadership and shared ownership to grow.

One theme stands out clearly: when communities are treated as capable and trusted to lead, they rise to the occasion. This work reinforced what many partners already knew — that investing in people, leadership, and the human capacity for collaboration is central to systems change. Long-term, flexible support matters, especially in rural communities where coordination takes time and distance can be a real barrier.

We share this evaluation not simply to document what happened, but to learn from it together. These lessons continue to shape how we approach our work at Headwaters, and there is still much work to do together. Families continue to navigate real gaps in childcare, early learning, and support. At the same time, the relationships and infrastructure built over these years offer a strong foundation for what comes next.

We hope this evaluation honors the communities who led this work and serves as a resource for those committed to strengthening early childhood systems in Montana and beyond.

*With gratitude for the partners and
communities who made this work possible,*

YOUR FRIENDS AT HEADWATERS FOUNDATION





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**Images without captions provided by Headwaters Foundation

Executive Summary

Introduction

Headwaters Foundation was established in 2016 to steward community resources from the sale and privatization of Community Medical Center. Mirroring Community Medical Center's footprint, Headwaters distributes funds in Montana's fifteen westernmost counties to promote health and social well-being. From its earliest days, Headwaters prioritized centering the community and adopted a Trust-Based Philanthropy approach.

Headwaters' Early Childhood Initiative (2018-2024) was its first major focus as a foundation. The Initiative was informed by a listening tour, during which the foundation heard Montanans' desire for early childhood systems and services that better meet families' needs. The resulting Initiative was ambitious and expansive, intended to transform Montana's early childhood sector by strengthening early childhood infrastructure and sparking policy and systems change. In April 2025, Headwaters commissioned this third-party evaluation to learn about the Initiative's implementation and early outcomes.

Launching The Early Childhood Initiative

Early childhood encompasses a series of interconnected priorities and vital issues, including pregnancy and birth outcomes, child care, early learning and school readiness, and family health and well-being. Montana has long ranked behind other states in building a robust early childhood system and providing families with the structural support to succeed. Historically, the early childhood sector in Montana has been shaped by changes in federal funding availability, with limited opportunities for consistent local work or larger-scale systems-change efforts.

Through its Early Childhood Initiative, Headwaters invested over \$13.1 million into the early childhood sector over six years.

This funding was not just exponentially larger than prior private dollars, it was also more flexible and intended to radically change early childhood systems in Montana and bring new energy to the sector.

Headwaters funded early childhood collaboratives in six counties starting in 2018 and an additional collaborative starting in 2021. The collaboratives each had a community-based anchor organization that managed the grant and worked with cross-sector partners to develop shared agendas, strategies, and goals. They each operated independently of one another and the statewide office, Zero to Five Montana, with total discretion over goals and strategies, operations, and budget.

To support statewide changes and provide a pipeline for local priorities to inform state strategies, Headwaters also funded Zero to Five Montana. This statewide office focused on policy and advocacy and built relationships with state, local, and national partners. Headwaters also funded capacity-building and technical assistance for local collaboratives, mainly through the University of Montana Center for Children, Families, and Workforce Development (The Center).

Impacts

Common themes, impacts, and outcomes emerged across the Early Childhood Initiative in local communities and at the statewide level.



- **Increased Parent Engagement:** All local collaboratives reported more parent engagement, more connectedness across systems that impact families with young children, and more awareness of the importance of early childhood in their communities.
- **Established New Programs and Services:** Local collaboratives created, supported, and built new programs and services in their communities to support families and young children.
- **Developed Local Leadership:** Many local collaboratives became the leader and go-to resource for “all things early childhood” in their communities.
- **Built New Gathering Spaces:** Several collaboratives established or built new physical spaces for families, creating places for families and caregivers to bring young children and form new connections.
- **Increased Awareness:** Many local collaboratives worked to raise awareness and understanding about the importance of early childhood interventions, working to shift narratives including stigma about who deserves or needs assistance, support, or access to social services.
- **Increased Cross-Sector Collaboration:** Collaboratives increased connectivity and collaboration within communities, creating new or deeper cross-sector connections, sometimes over large geographic areas or crossing Tribal and non-Tribal boundaries.
- **Increased Connection Across Communities:** Local collaboratives connected with one another, built relationships, strengthened cross-county partnerships and worked together to provide support, share lessons, and solve problems. The work within collaboratives led to shared learning and, in some cases, new models for programs that could be used in other communities or statewide.
- **Contributed to Statewide Policy Wins:** The Early Childhood Initiative contributed to statewide policy wins, increasing attention to early childhood in the state legislature and helping pass early childhood bills.
- **Supported a Strong Statewide Office:** Zero to Five Montana contributed to advocacy and policy wins, connected local collaboratives to statewide efforts, and brought diverse cross-sector partners together.
- **Increased Partnership with Tribes:** Zero to Five Montana helped establish an Early Childhood Tribal Coalition, the first of its kind in Montana.
- **Secured Additional Funding:** Local collaboratives, Zero to Five Montana, and Headwaters leveraged the investment to secure additional funding for early childhood efforts.

Lessons Learned

- **Relationships:** Relationships are key, and they are the only way to identify, understand, and address real needs to make real progress.
- **Self-Determination:** Local leadership and communities' self-determination are central. When communities identify their needs and goals, they create programs that meet those needs in ways appropriate to local cultures and build on local strengths and systems already in place.
- **Systems Change Entry Points:** Systems change looks different in each community and requires flexible and responsive support.
- **Projects and Programs:** Parents and caregivers need opportunities for social connection, to build supportive relationships, and to find common purpose. Programs and spaces that bring people together are important groundwork for systems change.
- **Trust-Based Approach:** Headwaters' trust-based approach, commitment to ongoing communication, flexible funding, and openness to learning and pivoting were key to Initiative success.
- **Role Clarity:** Clarity around partner roles and responsibilities was important. The lack of clarity created confusion, frustration, and sometimes hindered progress.
- **Peer Learning:** Collaboratives appreciated opportunities to learn from one another. Some wanted more opportunities to connect and a more formal process to build on successes.
- **Local Leaders:** It's important to 'build a deep bench' of advocates and leaders. Investing in people takes time and helps develop shared visions and outcomes.
- **Momentum via Funding:** Funding can create momentum. Even in some communities with long-standing early childhood coalitions, new funding brought renewed energy and additional opportunities.
- **Dedicated Technical Assistance:** Having a dedicated and trusted technical assistance provider benefited local collaboratives.
- **Community Factors:** Specific community factors enabled local collaboratives' success, including community readiness and existing structures, leadership and trust, community and cross-sector support, and community pride.



Captured by photographer Antonio Ibarra at Dia de los Muertos event in downtown Missoula.

Challenges

- **Time and Momentum:** Systems change takes time, and it can be difficult to maintain momentum in the face of changes and turnover.
- **Trust-Based Practice:** Trust-Based Philanthropy requires careful attention to relationships and thoughtful practice.
- **Role Confusion:** There was sometimes confusion about Headwaters' and partners' roles.
- **Varying Needs:** Varying needs across communities and among key partners can create tensions.
- **Technical Assistance Gaps:** Collaboratives' experiences with technical assistance varied, and some wished for additional support.
- **Old vs. New Tensions:** Some communities experienced tensions between the "old" and the "new."
- **Power Dynamics:** It is important to attend to context and power dynamics, and to nurture and protect relationships.
- **Unintended Consequences:** A large influx of funding can create unintended consequences such as shifts in how partners work together.
- **Logistical Challenges:** Large grants can be logistically challenging for organizations when existing systems are not accustomed to moving large amounts of funding.
- **Missed Opportunities:** Some collaboratives identified missed opportunities for collective impact work.
- **Measurement Challenges:** Tracking progress and outcomes across the Initiative was more complex than expected.
- **Sustainability Gaps:** Local collaboratives are in different places when it comes to sustaining their work.

Early Childhood In Montana *After* The Initiative



We have seen remarkable progress in the early childhood sector at the state and local level. Public interest in early childhood and investments have increased, with more policies in place to support Montana families.¹ There is excitement in the sector for its new capacity, stronger structures, and close relationships, along with a sense of forward momentum and unified voices to continue advocating for Montana families. The Early Childhood Initiative and its partners have contributed to these substantial improvements. Despite all this progress, many Montana families still lack the structural support needed to thrive, indicating that there is more work to be done.

The Early Childhood Initiative shows what is possible when funding is flexible and responsive, when local voices are lifted up, and when communities determine their own needs. The Initiative contributed to shifting conditions in local communities and the state, and communities have increased ability to organize and build power around early childhood issues. Now there are models that can be implemented statewide, and new partnerships at the local and state levels.

¹ Zero to Five Montana. 2025 Legislative Session Report. 2025. https://zerotofive.org/wp-content/uploads/2025/06/2025-Exec.-Summary_External.pdf



PART 1

Background & Context

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Introduction

Between 2018 and 2024, Headwaters Foundation undertook an ambitious Early Childhood Initiative to transform Montana’s early childhood sector. This report is the product of an evaluation conducted by independent, third-party evaluators commissioned by Headwaters in April 2025. The evaluation aimed to learn about the Initiative’s implementation and early outcomes using a case-study approach, centering local communities and focusing on wins, challenges, and lessons learned.

This evaluation emphasized community participation and included interviews with 28 participants and two focus groups with 13 parents and caregivers. Evaluators held two “sensemaking sessions” with 19 participants to review early findings, make corrections, and add new information. A five-member advisory group provided guidance and input throughout the evaluation. Evaluators reviewed over 100 documents from Headwaters and Initiative partners.

Overall, the evaluation included 45 participants from seven local community collaboratives, Zero to Five Montana, Headwaters Foundation, and key partner organizations, including Montana Department of Public Health and Human Services (DPHHS) and UM Center for Children, Families and Workforce Development (The Center).

Through the evaluation, participants shared successes and setbacks, describing community context and strengths, goals, and outcomes. The evaluation was an opportunity for those at the center of the work to engage in reflection and learning, helping to identify and carry lessons forward into future work, and providing relevant information to support other community-centered, Trust-Based Philanthropic Initiatives.



Photo captured in Dillon on Headwaters' CEO Tour in 2025.

Background

Headwaters Foundation was established in 2016 to steward community resources from the sale and privatization of Community Medical Center. Mirroring the Community Medical Center's footprint, Headwaters distributes funds in Montana's fifteen westernmost counties to promote health and social well-being.

From its earliest days, Headwaters prioritized centering the community and adopted a trust-based approach. **Trust-Based Philanthropy** is an effort to address power imbalances between funders, nonprofits, and communities. It's a commitment to shifting power to nonprofits and communities, advancing equity, and building mutual accountability, with funders working alongside nonprofits as collaborators and partners, and carrying a commitment to transparency, responsiveness, and collective accountability.²

Trust-Based Philanthropy is an effort to shift funder-grantee relationships. A trust-based approach guides the four key dimensions of a funder's work: culture, structures, leadership, and practices.³

² <https://www.trustbasedphilanthropy.org/what-is-tbp>; <https://www.trustbasedphilanthropy.org/blog-1/2019/2/27/funder-spotlight-headwaters-foundation>

³ Trust-Based Philanthropy in 4D. https://static1.squarespace.com/static/607452f8ad01dc4dd54fc41f/t/61606874440b79448fb082c3/1633708148997/TBP+in+4D_Oct2021.pdf



Early Childhood In Montana – *Before The Initiative*

Early childhood encompasses a series of interconnected priorities and vital issues, including pregnancy and birth outcomes, child care, early learning and school readiness, and family health and well-being.



Montana has long ranked behind other states in building a robust early childhood system and providing families with the structural support they need to succeed. Historically, early childhood has been shaped by the availability of federal funding, administered by limited grants that flow through state agencies. The context included below provides insight into what existed prior to the Early Childhood Initiative, and how this Initiative represented a unique opportunity for Montana.

Community-led early childhood coalitions were established in Montana in 2012 through the Best Beginnings Initiative, which was launched by the Early Childhood Services Bureau and the Family and Child Health Bureau. The coalitions were funded through federal grants distributed through DPHHS to build local capacity for collaboration in the early childhood sector. In 2015, DPHHS created the Montana Early Childhood Coalition (MTECC) to support these

coalitions and increase opportunities for cross-coalition collaboration. In 2016, Healthy Mothers Healthy Babies, a nonprofit, took over MTECC's facilitation. They focused on developing a resource guide, convening coalitions, and upstream prevention efforts.⁴



Zero to Five leaders from Western Montana gathered in Helena in 2023.

⁴ University of Montana Center for Children, Families, and Workforce Development. (2024). Assessing Early Childhood Coalitions in Montana to Better Understand Their Impact and Influence. https://hnhb-mt.org/wp-content/uploads/2025/08/ecc_impactreport_2024_final.pdf

During this time, other notable sources of early childhood funding included federally funded Preschool Development Grants (PDG), which the Office of Public Instruction (OPI) distributed in partnership with DPHHS. PDG grants supported states' ability to increase access to and quality of preschool programs and build more coordinated early childhood systems. In 2014, Montana received its first PDG grant, providing \$10 million per year for four years. This funding was used to increase preschool slots in Montana school districts and Head Start programs. Later PDG grants were smaller and varied in focus. In 2019, Montana received a \$6 million planning grant, which was renewed in 2022. This grant focused on building statewide infrastructure to support systems change. There were few opportunities for consistent local work or larger, systems-change efforts in the sector with DPHHS as the major funder of early childhood work in Montana, as DPHHS was limited to distributing restricted federal funding.

Montana's frayed early childhood system was reflected in many early childhood metrics, and the state consistently ranked poorly among U.S. states at the time. For example, in 2017, Montana was one of only seven states without a publicly funded preschool program for 3- and 4-year-olds.⁵ Montana ranked 40th among states for child care access, and was one of five states meeting less than half of child care needs.⁶ These issues were especially acute in rural and tribal areas, including Western Montana communities, where families have long felt the impact of disinvestment, experiencing limited opportunities, scarce resources, and disjointed health and social services.⁷

THE CALL WAS CLEAR:

In 2017, Headwaters' leaders traveled to Western Montana communities on a listening tour, spending time with people and organizations to build relationships, explore what was most needed, and learn where an influx of philanthropic support could create lasting change.

Montana's early childhood system was falling short. Montanans wanted Headwaters to fund efforts that would benefit families, children, and Native communities, and to focus on the root causes of issues. They wanted local partners to drive collaborative solutions across sectors in their communities and greater coordination and collaboration across communities. Community leaders called for stronger partnerships between nonprofits, state agencies, and philanthropy, with a growing need for advocacy focused on birth to age five. All this input led to the development of the Early Childhood Initiative.



5 Barnett, W.S. et al. (2017). "The State of Preschool 2016: State Preschool Yearbook" (New Brunswick, NJ: National Institute for Early Education Research), available at <http://nieer.org/state-preschool-yearbooks/yearbook2016>

6 Watson, A. (September 2018). Childcare in Montana: Supporting Montana Families and Caring for the State's Most Precious Resource. Montana Department of Labor & Industry. <https://fundersformontanachildren.org/wp-content/uploads/2018/12/0918-ChildcareInMontana.pdf>

7 Ibid



PART 2

Inside The Initiative

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Launching The Zero To Five Initiative

Headwaters launched its Early Childhood Initiative in 2018 to improve the lives of young children and families in Western Montana, investing over \$13.1 million over six years to strengthen early childhood infrastructure and spark policy and systems change.

It is hard to overstate how unprecedented this investment was and is for Montana. Prior to this investment, funding for early childhood was largely limited to restricted, time-limited federal initiatives that provided either a one-time infusion or small, recurring funding. Headwaters' investment was not just exponentially larger; it was also more flexible and intended to radically change early childhood systems in Montana and bring new energy to the sector.

Headwaters' strategy was to expand the early childhood coalitions to become more cross-sector and collaborative, to create "larger tables" with room for everyone interested in supporting families. Their aim was to encourage a more expansive, inclusive vision for early childhood work, one that is locally held and linked across communities. This required deeper investment in infrastructure. Headwaters funded the development of new and expanded **local early childhood coalitions, called "collaboratives."** It's important to note that while early childhood coalitions existed throughout the state, Headwaters provided funding within its geographical boundary in Western Montana.

To support statewide changes and provide a pipeline for local priorities to inform state strategies, Headwaters funded a statewide office, which was later branded Zero to Five Montana. While there was an initial vision for the office's role, those shaping the work needed to build the organization and refine its vision. Over time, the statewide office evolved to focus on policy and advocacy work, and on building relationships with state, local, and national partners.

Headwaters also funded capacity-building and technical assistance for local collaboratives, which were primarily provided by the University of Montana Center for Children, Families, and Workforce Development (The Center). The Center provided resources for local and statewide needs, including data collection support, landscape analyses, policy and procedure development, and project management coaching. Other partners provided additional, specific technical expertise (e.g., Headwaters provided training with external consultants to help with facilitation and collaboration).



Casey Fuson and son in Lincoln County, Montana



Local early childhood coalitions or collaboratives are community-based efforts to coordinate partners and provide collective leadership to improve the health and well-being of children and families. Some coalitions or collaboratives directly manage services or programs; others do not. Coalitions and collaboratives focus on working together, coordinating and aligning partners to raise awareness, increase engagement, and expand the capacity of early childhood initiatives.⁸

⁸ Watson, A. (September 2018). Childcare in Montana: Supporting Montana Families and Caring for the State's Most Precious Resource. Montana Department of Labor & Industry. <https://fundersonmontanaschildren.org/wp-content/uploads/2018/12/0918-ChildcareInMontana.pdf>

Headwaters approached its Early Childhood Initiative with a desire to shift the early childhood landscape and create positive, long-lasting benefits for families. Headwaters aimed to build strong, meaningful relationships across sectors, engaging community members closest to the issues, and applying trust-based practices to seed work that would take on its own life, with community leaders co-designing and guiding the Initiative. This approach was informed by **Collective Impact** and **systems change** frameworks.

Informed by these frameworks and its goal to transform the early childhood landscape, Headwaters set several specific goals for this Initiative, inclusive of the work of local collaboratives and the statewide office and supported by The Center.

Collective Impact is a process where cross-sector partners come together with a common goal, shared agenda, and measurement. Partners engage in mutually reinforcing activities and continuous communication, with a strong backbone organization or team.⁹ Collective Impact provided inspiration at the beginning of this Initiative, and some local collaboratives utilized the framework and principles.

9 Collective Impact Forum. *What is collective impact?* <https://collectiveimpactforum.org/what-is-collective-impact/collectiveimpactforum.org>

Systems change focuses on the conditions required for change. One such framework, “The Water of Systems Change,” calls this “addressing the conditions that hold a problem in place.”¹⁰

10 Kania, J., Kramer, M., Senge, P. (2018). *The Water of Systems Change*. FSG: Reimagining Social Change. https://www.fsg.org/resource/water_of_systems_change/



Photo captured in Trego, MT



Photo captured at Village Playspace in Dillon, MT

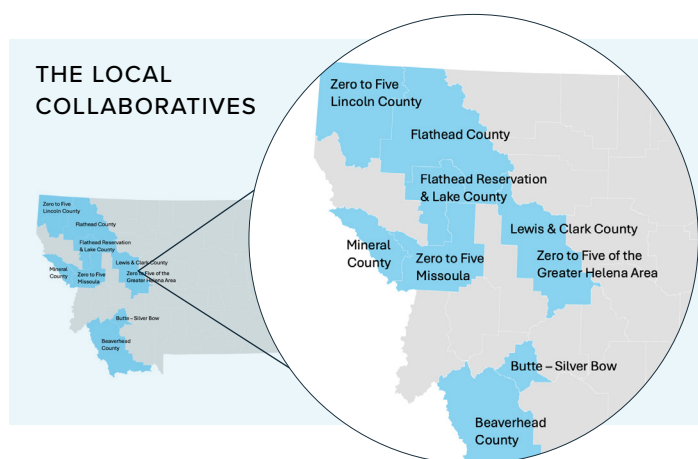
Goals Of The Early Childhood Initiative

SHORT-TERM GOALS (Years 1-2, 2019-2020)	• Increase knowledge of early childhood systems • Develop cross-sector, community-led collaborations • Create a central resource center (strategy, communications, and technical assistance)
INTERMEDIATE GOALS (Years 3-5, 2021-2023)	• Increase coordination and collaboration across agencies and between state and community partners • Improve access to state programs and services through shifts in policy, funding, regulations, etc. • Build community capacity to advance positive change for kids • Leverage funding for early childhood work in Montana
LONGER-TERM GOALS (Year 6, 2024 and beyond)	• Increased public investment in the early childhood system • Improvements in child and family health and well-being

The Local Early Childhood Collaboratives

Starting in 2018, Headwaters funded early childhood collaboratives in six Western Montana counties (Flathead, Lewis and Clark, Lincoln, Missoula, Mineral, and Silver-Bow), and Zero to Five Montana, the new statewide advocacy office based in Helena. Funding for one collaborative (Flathead County) ended in 2020, and two new collaboratives were funded in 2020 (Beaverhead County) and 2021 (Flathead Reservation/Lake County).

While the collaboratives were unique, they shared some structural similarities. Within each collaborative, a community-based anchor organization was responsible for managing the grant and ensuring success. Each collaborative was designed to be truly collaborative, with the agenda, strategies, goals, and solutions shared by cross-sector partners, rather than held by a single organization. This was a way to center and support local solutions and leadership, supporting communities working across sectors to identify the most pressing issues for families and find shared solutions to address them. Each collaborative operated independently, with total discretion over its goals and strategies, operations, activities, and budget.



While some collaboratives were built on existing early childhood coalitions, Headwaters emphasized the benefits of creating new partnerships to avoid real or perceived barriers that stymied prior efforts. Communities voted on the anchor organizations for the first four funded collaboratives. In some smaller communities, Headwaters considered in its funding decisions on other factors, including community capacity and the readiness of community leaders. As a result, the collaboratives began in 2018 in different stages of development. Some were built from existing coalitions, included partners with

long histories of working together, or were led by established community leaders. Others were new partnerships or young organizations. Some quickly identified specific projects or work plans based on past underfunded projects or existing ambitions. While others needed a longer process to identify shared goals and choose strategies.

Headwaters committed to funding each collaborative for up to six years in several rounds. Each collaborative received up to \$50,000 for 6-12 months of planning, followed by up to \$200,000 annually for five years of implementation. Headwaters chose to give equal funding to each community, reasoning that while larger, more urban communities often serve larger populations, rural communities often have fewer existing resources or fewer organizations to serve families. Often, rural communities need to build additional infrastructure that may already exist in more populous urban communities.

Funding from Headwaters was renewed annually if collaboratives made consistent, measurable progress toward their goals. Each collaborative's unique goals were driven by the needs and strengths of its community. Some focused on school readiness (math and/or reading proficiency, child care capacity and/or quality), others on supporting families (children in poverty, rates of substantiated abuse and neglect, children in foster care), and others on healthy pregnancies and births (prenatal care, preterm births, infant mortality, health insurance). Because of their different goals, unique contexts, histories, and anchor organizations, each collaborative took a different shape, with different partners and activities, which often evolved over time. All collaboratives included some focus on family engagement and leadership. The table on the following page lists each collaborative and its core goal(s).

The Local Collaboratives

Collaborative / County	Goal(s)	Key Partners / Anchor Org.	Years Participating
Beaverhead County	Provide greater access to existing resources for children and families in the county; create and implement additional resources so children are supported in their growth and development, parents are empowered to raise their children with skills and confidence, and families are connected to one another.	Be the Change 406 (2020) Odyssey Early Learning Center (2021-2024)	2020-2024
Butte-Silver Bow County	To reduce the number of children in foster care in Butte-Silver Bow by 75% by 2025.	Butte's 4 C's	2018-2024
Flathead County	To work with families to change the environment in which people parent.	Flathead County Health Department	2018-2020
Flathead Reservation & Lake County	Increase opportunities for pro-social engagement for children and families on the Flathead Reservation and in Lake County. Bring together a diverse cross-sector group of community members, to build stronger community understanding, education, and engagement in the early childhood sector.	Helping Hands	2021-2024
Lewis & Clark County Zero to Five of the Greater Helena Area	With the focus on the whole child, promote community collaboration to network resources and streamline services in support of the health, safety, care, and education for children prenatal through 8 years of age and their families in the greater Helena area.	United Way (2018-2020) St Peters Health Foundation (2021-2024)	2018-2024
Zero to Five Lincoln County	To build a county in which all families with young children are valued, connected, and empowered through community supported families. By 2026, all families with young children will have meaningful engagement with an Early Childhood (Zt5) outreach effort or program.	Lincoln County Health Department	2018-2024
Mineral County	Strengthen positive parenting in Mineral County by supporting families through existing early childhood programs.	Mineral County Health Department	2018-2024
Zero to Five Missoula County	Ensure that all children in Missoula County are ready to thrive in school and beyond.	United Way	2018-2024

Statewide Leadership and Technical Assistance

Headwaters originally funded three organizations to lead statewide early childhood efforts: Healthy Mothers Healthy Babies, Childwise (at Intermountain), and the University of Montana Center for Children, Families and Workforce Development (The Center). Headwaters hoped that funding these three organizations would build on existing statewide work and avoid the need to create a new organization. There were also challenges with this hybrid model, as each of the three organizations had its own vision, culture, and dynamics.

Establishing Supportive Infrastructure

After about six months, Headwaters and its partners pivoted. The statewide office became a unique entity, first fiscally sponsored by Intermountain before becoming an independent nonprofit (501c3) in 2022. The new organization's leader had deep experience strengthening early childhood systems (and was the program coordinator under the prior arrangement). The key focus of the new statewide office (later branded Zero to Five Montana) was to develop and execute strategies to support stronger early childhood systems across the state, including a state-level policy agenda, local and statewide advocacy, and public-private partnerships to advance early care and education policy. Another key function was to foster local engagement, including parent advocacy, at the state level. Early on, the statewide office played a large role in convening and supporting local collaboratives. This shifted as Zero to Five Montana took on a stronger policy and advocacy focus, and it became clear that the local collaboratives required more dedicated technical assistance.

Throughout the Early Childhood Initiative, Headwaters funded The Center as the main provider of technical assistance to local collaboratives. The Center provided data, research, local evaluation tools, strategic planning support, and training. The Center conducted social network analysis research early in the Initiative to help the local collaboratives understand organizational relationships in their communities. Over time, as local collaboratives and statewide needs evolved, it became increasingly important for The Center to be responsive and to customize its support, often focusing on strategic development and evaluative activities.

Support Beyond The Check

Headwaters provided local collaboratives with “support beyond the check” (a trust-based philanthropy practice that provides responsive, non-monetary support beyond the grant itself) through technical assistance from The Center and advocacy support from Zero to Five Montana. Headwaters staff developed personal relationships with many local collaboratives' staff and were available for check-ins, troubleshooting, and thought partnership. In interviews, we repeatedly heard that Headwaters' ongoing availability and support was invaluable. Additionally, Headwaters organized or supported convenings at least once a year. Early on, partners attended convenings to share initial ideas and participate in training. Later, Zero to Five Montana and The Center hosted convenings that included training and goal setting.

Other Support For The Early Childhood Sector

During this Initiative, Headwaters funded other strategic early childhood work in response to emerging needs and opportunities. While these partners weren't always integrated into the Early Childhood Initiative (they did not attend convenings or use the Zero to Five name), these efforts also supported the early childhood sector and sometimes overlapped with the Initiative's goals and other efforts. For example, Headwaters funded Raise Montana and Montana Advocates for Children, statewide partners important to the overall early childhood system in Montana and local collaboratives' efforts in some communities. In Boulder, Montana, Headwaters' funding helped to establish the first licensed child care center and led to the creation of a new nonprofit focused on child care services in the community. While these efforts were outside the formal Initiative, they contributed to the strengthening of the early childhood sector during this time.



PART 3

Initiative Findings

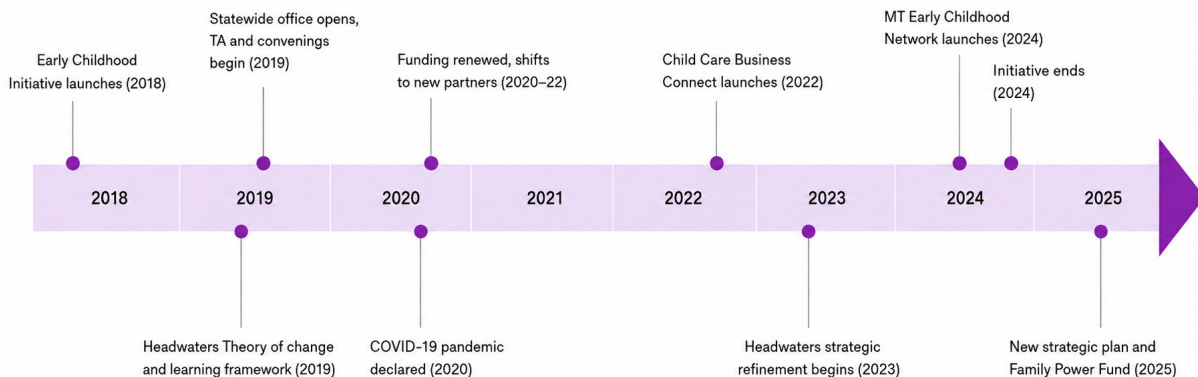
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An Evolving Landscape

Before we consider the outcomes of the Early Childhood Initiative, it's important to examine the context in which the work took place. Though the Initiative was only six years long (2018-2024), remarkable changes occurred during that time. The timeline illustrates the major milestones of the Initiative's statewide and local efforts, including notable milestones in Montana and at the national level that affected the early childhood system. Several particularly influential events that occurred during the Initiative are worthy of closer reflection.

Headwaters Foundation Early Childhood Initiative

Condensed Timeline — Key Context, 2018–2025



[VIEW FULL TIMELINE HERE →](#)

The COVID-19 pandemic was transformative for local collaboratives, partners, families, and Montana as a whole. The pandemic tested, stretched, and changed lives, communities, organizations, and systems. Across the state, work arrangements shifted, child care facilities and schools closed, social expectations changed, and organizational priorities shifted rapidly. An influx of new residents moved into Montana communities, increasing the demand for limited services. Simply put, Montanans experienced rapid and unexpected disruption and change. The pandemic had different impacts on partners and local collaboratives. Some were able to accelerate their work because of the pandemic's added urgency and the sudden, widespread attention to how families and young children were struggling. For other collaboratives, the pandemic had a chilling effect, postponing nascent efforts or prompting a re-evaluation of strategies that relied on in-person gatherings. Particularly if the anchor

organization was a health department, organizational priorities shifted rapidly as personnel had to be reassigned or take on new roles, sometimes leading to a loss of momentum or service interruptions.

The influx of federal relief dollars for pandemic recovery had a transformative effect on Montana's child care system. Infrastructure and relationships built through the Early Childhood Initiative helped some communities access and use these funds. Between 2020 and 2023, unprecedented levels of federal funding (nearly \$200 million) arrived to stabilize and support Montana's child care system, through measures such as the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) in 2020, the Coronavirus Response and Relief Supplemental Appropriations Act (CRSSAA) in 2021, and the American Rescue Plan Act (ARPA) in 2021.¹¹ Some communities were able to apply for or facilitate funding because of the groundwork

11 Burg, X. (January 2023). Montana's Child Care System: Investments Needed to Support Families and Child Care Businesses. Montana Budget & Policy Center. <https://montanabudget.org/report/mt-childcare-investments>

laid and capacity built through the Early Childhood Initiative. Zero to Five Montana played an important role advocating for community funding and helping local collaboratives write grants to secure it. The pandemic and influx of funding also upended ideas about who needs assistance or government services, as well as the importance of early childhood, child care, and schools. In some communities, this was a once-in-a-generation opportunity to invest in early childhood and move the needle on this issue, now considered vital to community health.

Several other key changes during the Early Childhood Initiative impacted local and statewide early childhood work, including the reorganization and consolidation of early childhood work at DPHHS, as well as departures of some long-tenured staff and leaders. In January 2020, the Early Childhood and Family Support Division (ECFSD) was established to improve coordination of existing services for children and families.¹² This consolidation came after the first Preschool Development Grant (PDG), a competitive federal program funding increased preschool slots in school districts and Head Start programs across Montana. At the time, services supporting children and families were split across various DPHHS departments, making coordination challenging. Consolidation allowed for easier internal and external coordination and was intended to support systems change. There was a reimagining of the public early childhood system by new DPHHS staff and roles, which resulted in the consolidation of important early childhood contracts and the end of key funding for home visiting.

Other systems-level work led by Zero to Five Montana and its partners helped prepare the state for the unexpected influx of COVID-19 relief dollars. In 2020, Zero to Five Montana was awarded a technical assistance grant to convene the Montana Early Care and Education (ECE) Business Collaboratory. This cross-sector group of public and

private partners mapped the child care landscape and developed shared priorities to better support child care businesses and the broader early childhood system. This proved especially timely and influential when COVID-19 relief funding became available. Zero to Five Montana and partners advocated for targeted investments aligned with ECE's recommendations. As a result, the ARPA Health Advisory Commission directed over \$42 million in funding toward several initiatives designed to address these identified gaps.

Among other efforts, this funding supported the creation of the Montana Child Care Business Connect program, led by Zero to Five Montana, which provides technical assistance and training to child care businesses. Funding also supported shared services and training efforts administered by RAISE Montana, development of child care apprenticeship and pre-apprenticeship pathways through the Montana Department of Labor and Industry, and \$15 million in Child Care Innovation Awards for 30 organizations, including several initiatives led by local collaboratives.

Following the initial two-year grant period, DPHHS restructured its contracts for federally funded child care services. Zero to Five Montana was awarded a new contract to continue delivering the Montana Child Care Business Connect program. DPHHS also implemented a new contract with an out-of-state vendor to support child care services, replacing six separate contracts previously held by regional organizations in Montana. Organizations that relied on those prior contracts had to restructure and lay off employees, and child care providers are still working to figure out new systems to receive support for their businesses, licensing, and other services. This change heightened tensions and raised questions for many in the early childhood system. In an underfunded and ever-changing sector, funding and contract decisions can bring tensions and perceptions that interfere with the work and collaboration.

¹² Department of Health and Human Services. Early Childhood and Family Support Division. About Us. <https://dphhs.mt.gov/ecfsd/AboutUs>

Impacts Of The Zero To Five Initiative

During all these contextual changes, the local collaboratives, the statewide office, and partners got to work to improve the early childhood sector. Over time, some common themes and outcomes emerged across the Early Childhood Initiative in local communities and at the statewide level. The themes below were the most commonly heard during evaluation interviews and were also evident in our document review.

All collaboratives reported increased parent engagement, more connectedness, and more awareness of the importance of early childhood in their communities.

The Early Childhood Initiative elevated parent and caretaker voices and engagement and built new structures to involve families. Engaging families and uplifting community voices was an important outcome for many local collaboratives, helping ensure that those closest to challenges were part of identifying appropriate solutions.

In Lewis and Clark County (Greater Helena):

The local collaborative partnered with Head Start and Zero to Five Montana to hold structured advocacy training sessions, using the Parent Village Parent Nation Framework. Parents could come, connect, and be recognized as experts in their experience and receive advocacy training. Legislative sessions brought opportunities for that group to use their voice.

“Having coalitions organize at the local level is imperative. Without these coalitions, there is a huge gap between the federal, state, and local levels. We need people organizing locally to get parents connected with entities such as the library and local businesses, or there’s a huge disconnect.”

- TRACY MOSEMAN
DPHHS

Local collaboratives **created, supported, and developed a variety of new programs and services** in their communities to support families and young children. In some cases, local collaboratives connected with existing programs and services to create an improved continuum of care for families.



Photos are from The Village Playspace, operated by Early Childhood Coalition of Beaverhead County

Many local collaboratives became the leader and go-to resource for “all things early childhood” in their communities. For some, this was true before this Initiative, but for others, it was established or strengthened.

Several collaboratives **established or built new physical spaces to support families**. These were typically indoor and outdoor play spaces where families and caregivers could bring young children and form new connections. Part of systems change is relational change, and these physical spaces allowed folks to find one another and connect over a common purpose. In some cases, new physical spaces created additional ripples that contribute to systems change.

In Beaverhead County:

The Village has become a hub for families with young children, facilitating relationships, resource sharing, and even providing flexible jobs for caregivers with young children.

In Butte County:

Learning Landscapes, an outdoor playspace, created a place for positive interactions between caregivers and children.



The Village Playspace, Dillon, Montana

Many local collaboratives worked to raise awareness and understanding of the importance of early childhood interventions, and shift narratives harmful to families.



Photo provided by the Zero to Five Mineral County Collaborative

These included stories and stigma about who deserves or needs assistance, support, or access to social services. In some communities, collaboratives worked to counter deep distrust among groups, organizations, and populations, bringing these relationships to new, more positive places. Some collaboratives included

efforts that gave child care providers visible credit, positioning them as unsung heroes, vital to community health, and important contributors to the well-being of children and families.

In Mineral County:

The local collaborative started a new free doula program, making these services available to all families, not just those who could previously afford private doula care.

In Butte County:

As the local collaborative and partners worked to reduce child welfare involvement, it became evident that this was connected to a variety of upstream factors, including limited access to resources and high rates of substance use. Their multi-pronged approach included support for parents and children prior to welfare system involvement, and peer support for families already involved to support healing and avoid recidivism.



“We wanted to make things universally available. If you want to make a cultural change in a community, having services just for one group of people at a specific income level keeps them in that bubble, versus making it something that’s just what we do for our community. Then it becomes the norm for everybody. We saw this as an opportunity to be able to do that for our families, and this provided the catalyst to do it.”

- APRIL QUINLAN

Mineral County, Mineral County Health
Department/Family Connections
Collaborative



Photo provided by the Zero to Five Mineral County Collaborative

The Early Childhood Initiative increased connectivity and collaboration within communities, creating new or deeper cross-sector connections through active, engaged collaboratives, sometimes over large geographic areas or crossing Tribal and non-Tribal boundaries.

We heard about new connections and the creation of a new, tightly aligned network of people working on early childhood issues in communities. Sometimes this included partners who had worked in early childhood for a long time. For others, it included partners who were new to the work or had not previously identified as early childhood advocates. Whether this was the first time working together or the first time working together in this way, collaboration helped avoid duplication in services and laid the groundwork to advance a collective agenda around early childhood, both within local communities and at the statewide level.

In Butte County:

This Initiative improved relationships in the community and created a stronger system for partner referrals. Partners who previously struggled to work together collaborated effectively after working side by side in this Initiative. Having successful collaborative experiences increased trust, enabling partners to work through differences and meet clients’ needs.

In Beaverhead County:

Community members recognized that young children and families needed more support, but before this funding, no organization had the capacity. Because the community is small, it was vital to involve multiple cross-sector partners in the collaborative: public health, the local hospital, families, businesses, and even the local judicial system. The new collaborative created opportunities for these partners to coalesce around shared goals and come together to meet community needs.

In Lake County:

The collaborative strengthened relationships and connections, meeting monthly with 20-30 attendees and a growing listserv connecting individuals from organizations in child care and healthcare. As a result, programs are working together differently; for example, local hospitals have connected with Tribal Health in new ways.

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“I brought everyone into the community and said, ‘You do not have to be a non-profit; we want to work with you.’ The quality of our events, how we do them, and how we emotionally connect with people-- this brings us partners with ideas. It’s great. It’s getting traction in a way that is going to help us scale.”

– MARIA EMMER-AANES,
Beaverhead



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“We’ve hosted events and trainings with Tribal and non-Tribal groups, programs, and community members mixing together. This has helped facilitate healthy communication that wasn’t there before. We’re seeing a long-term, systemic shift in our community around these issues. We’ve helped to facilitate some healthy partnerships that weren’t there before. And it’s continuing as we go forward.”

– DANA GRANT,
Lake County & Flathead Reservation



Local collaboratives connected with one another, building relationships, strengthening cross-county partnerships, and working together to provide support, share lessons, and solve problems.

The local collaboratives learned from one another, taking note of successes, sharing challenges openly, mentoring one another, and building a new, strong network of early childhood advocates across geographies. Newer collaboratives appreciated learning from more established collaboratives; more established collaboratives were grateful to see new and creative ideas from other communities. This learning, capacity building, and emerging leadership occurred at both the organizational and individual levels. Across communities, the Initiative fostered a sense that there was collective work to do to strengthen the early childhood sector and that together, everyone could have a strong, shared voice.

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“I appreciated the opportunity to connect with other communities and have relationships with other LCCs so we could support each other. When there is something difficult, being able to talk to someone who gets it is so great. In our office, nobody else was doing that kind of work.”

– CASS WEBER,
Butte



Photos provided by Zero to Five Butte Silver-Bow Collaborative

Local innovation led to new models.

The collaboratives' local work led to shared learning across communities and, in some cases, to new models for programs that could be duplicated across the state and beyond. Successes at the local level can help build the case for promising early childhood efforts, functioning as local pilots for future expansion. The local and statewide structure of the Early Childhood Initiative provided opportunities for local communities to innovate and build what worked for them, with the possibility of lifting up successes via Zero to Five Montana and the shared network.

In Missoula County:

The Kindergarten Readiness Assessment was an early project started by Zero to Five Missoula. Early on, Missoula offered training and support to other collaboratives interested in implementing KEA (see the Missoula case study for more). There are now efforts to expand upon Missoula's success and adapt the KEA statewide. Zero to Five Montana hosted an educational webinar for school districts to learn more about Missoula's KEA, encouraging other districts to adopt and learn from this model and its successes, and more recently encouraged the state's School Funding Interim Commission to consider funding a statewide universal assessment.

Through the Early Childhood Initiative, Zero to Five Montana was established. This new statewide office contributed to advocacy and policy wins, connected local collaboratives to statewide efforts, and brought diverse cross-sector partners together. Prior to Headwaters' investment, most early childhood dollars in Montana came from the federal government and flowed through state agencies. This severely limited funding for advocacy and policy work at the state or local level. While Zero to Five Montana was never the only organization engaged in early childhood advocacy, it represented the largest influx of philanthropic dollars intended for this purpose.

Zero to Five Montana has emerged as a strong voice in early childhood advocacy, building bipartisan relationships, connecting local communities to advocacy opportunities, raising awareness of early childhood issues, and ultimately supporting the passage of new legislation to strengthen the sector.

“The statewide office is unique; before it, Montana didn't have a policy and advocacy organization dedicated to early childhood from birth to five. It's a complex time in people's lives, and we can't just focus on one issue. We need to understand systems-level work, the importance of policy and advocacy, and do it in conjunction with organizations providing direct services in local communities.”

— CAITLIN JENSEN,
Zero to Five Montana



When discussing the impacts of Zero to Five Montana, staff and partners emphasized building stronger cross-sector buy-in, including from new partners in the business community. Many feel that Zero to Five Montana successfully elevated early childhood issues and contributed to policy wins, establishing a pathway for local collaboratives to provide local voices and advocacy. Over time, as trust was built between local collaboratives and Zero to Five Montana, collaboratives were able to testify and participate more in statewide advocacy. The investment of philanthropic dollars in this effort created more flexibility than was previously possible (when most early childhood efforts were federally funded).

“Zero to Five is intended to provide a strong flow-through between local communities and what's happening at the statewide level. We wanted the organization to be a conduit between local and state, while also working in partnership with our state government to build a system that works for families.”

— CAITLIN JENSEN,
Zero to Five Montana



The Early Childhood Initiative contributed to statewide policy wins.

The Initiative has contributed to ongoing advocacy, including efforts to expand Best Beginning Scholarships through the passage of HB 648 (2023). The 2025 Montana State Legislature represented a new level of change, with a substantial increase in policymaking activity related to early childhood. In the 2025 session, legislators introduced 160 early childhood-related bills (compared to just a few in 2023 or prior sessions).¹³ Zero to Five Montana and other partners, including Healthy Mothers Healthy Babies and Montana Advocates for Children, contributed meaningfully to these successful bills,

partnering with lawmakers across political divides and involving the business community through ongoing programs and partnerships. Through events like Have a Heart for Kids Days, Zero to Five Montana, local collaboratives and partner organizations held meetings between legislators, Montana parents and other advocates to hear about the challenges families face in accessing early childhood support. These and other advocacy efforts promoted the importance of early childhood legislation, paving the way for the successful 2025 session.

Successful legislation has included:

2021

- **SJ 29:** Requests interim study of child care and the workforce
- **SB 407:** Establishes high-quality child care business development grants
- **SB 342:** Revises laws related to preschool programs
- **SB 311:** Revises child care scholarship program laws

2023

- **HB 187:** Clarifies that for the purpose of homeowner's associations (HOAs) covenants, family and group child care is a residential use of property.
- **HB 287:** Revises laws related to Indian language preservation, including early childhood settings, creating the Montana Indian Language Preservation Program.

- **HB 352:** Provides targeted interventions to support 3rd grade reading proficiency.

2025

- **HB 924:** Establishes the Early Childhood Special Revenue Account
- **HB 168:** Provides state funding for preschool children with disabilities
- **SB 319:** Revises health care laws related to doulas
- **SB 181:** Revises Indian Education for all laws.
- **HB 381:** Provides educational credit for students volunteering in long-term care, nursing home, home care, and child care settings

¹³ Zero to Five Montana. 2025 Legislative Session Executive Summary. Available at: https://zerotofive.org/wp-content/uploads/2025/06/2025-Exec.-Summary_External.pdf

“Each legislative session, we bring data and stories to lawmakers. We’ve worked hard to build bipartisan relationships, and it’s exciting to have champions for early childhood across the political spectrum.”

— ALEX DUBOIS
Policy & Engagement Director,
Zero to Five Montana



The Montana legislature has increasingly focused on early childhood as an important issue. Zero to Five Montana has been at the heart of these efforts, contributing to bills, tracking progress, and activating networks and partners to testify.

- **2021:** Zero to Five Montana tracked 12 bills/bill drafts, delivered testimony 7 times.
- **2023:** Zero to Five Montana tracked 130 bills/bill drafts, delivered testimony 25 times.
- **2025:** Zero to Five Montana tracked 260 bills/bill drafts and delivered testimony 71 times.

Zero to Five Montana helped establish an Early Childhood Tribal Coalition, the first of its kind in Montana.

This coalition, led by Tribal community members, provides Native communities with spaces to break down silos and work together to advocate for their cultural needs at local and statewide levels. This includes expanding access to culturally relevant early childhood education programs, which incorporate Indigenous languages, traditions, and practices.¹⁴ The first Zero to Five Montana Tribal Coordinator was hired in 2021 to continue strengthening Tribal voices



Photos provided by the Early Childhood Tribal Coalition and Zero to Five Montana

“The relationships being cultivated through the Montana Early Childhood Tribal Coalition are very intentional and authentic. I am bringing those perspectives to state officials and hopefully presenting a different lens for policymakers to look through when working with tribal communities as some state regulations and policies don’t reflect what’s best for tribal communities.”

— CALLIE PARR
Early Childhood Tribal Coordinator,
Zero to Five Montana



14 Zero to Five Montana. Early Childhood Tribal Coalition. Available at: <https://zerotofive.org/wp-content/uploads/2025/11/ECTC-Flyer.pdf>

Local collaboratives and the statewide office leveraged additional funding for early childhood.

This Initiative strengthened the work and infrastructure available in local communities, increasing their visibility and building the infrastructure needed for collaboratives to access and utilize other available funding (including ARPA funds). Some communities were able to apply for or facilitate federal and other funding because of the groundwork laid and capacity built through this Initiative. Because of the structures created through this Initiative, both Zero to Five Montana and the local collaboratives received additional grant funding from public and private sources, increasing the overall resources available in the state for early childhood efforts.

📍 In Lincoln County: *The Lincoln County collaborative advocated to county commissioners for ARPA funding, which was used to purchase a community resource van, supporting greater connectivity and access to services in their rural community.*

Between 2022 and 2025, Zero to Five Montana invested almost \$220,000 in local community collaboratives and other groups in Montana that support community-led early childhood solutions in areas including family advocacy, tribal language revitalization, and child care capacity.

Headwaters used this Initiative to elevate the needs of early childhood among funders, leveraging their contributions to secure more funding for early childhood— not only in Western Montana, but statewide.

Headwaters joined the Funders for Montana's Children (FMC) in 2018, a group of funders focused on early childhood issues. At the time, FMC was narrowly focused on increasing child care slots for infants 0-3 and engaging the business community. With the influx of funding under this Initiative, FMC shifted from its original programmatic focus toward learning together about early childhood and supporting the

field more broadly. Starting in 2021, Headwaters began leading coordination for FMC, and the group has collaboratively funded efforts including the MT Home Visiting Coalition and Montana Advocates for Children. Headwaters' leadership and funding brought additional clarity, focus, and momentum to the group, helping funders find a coordinated path forward with shared priorities.



Photo from Headwaters grantee site visit to Dillon, Montana

Lessons Learned Through The Zero To Five Initiative

While the experiences of each individual collaborative, Zero to Five Montana, The Center and other partners varied, they share many lessons learned as well.

Relationships are key.

Relationships are the only way to identify, understand, and address real needs to make real progress. These relationships include those within communities, relationships between organizations and families, and relationships between collaboratives and foundation staff. It also includes bipartisan relationship-building at the state level between advocates and policymakers. Relationships take time and care to build and maintain; they drive the work and must remain central for initiatives, programs, and systems to successfully change.

📍 Across the region:

The Center experienced this when providing technical support to Initiative partners. The Center team had to first build relationships with specific partners, local collaboratives, and communities. Only then could they truly understand individual needs and tailor support to meet those needs.

Local leadership and communities' self-determination are central.



Photo from Mineral County

Because of the Early Childhood Initiative's design, local collaboratives had space to identify what was needed in their communities and work toward those goals through programs, activities, and collective efforts appropriate for their communities.

Each collaborative built something different, while maintaining a sense of connection and support with other collaboratives and the statewide office. When communities identify their needs and goals, they create programs that meet those needs in ways appropriate to local cultures, building on local strengths and systems already in place. Several collaboratives felt that it created more stability and sustainability for their work in the long

term.

📍 In Butte County:

The collaborative felt this flexibility allowed them to meet community needs in ways that stirred excitement, increased connectivity, and tapped into existing priorities. They used festive events, including scavenger hunts and holiday parties, to foster stronger connectivity and sow cultural changes (such as alcohol-free gatherings). They centered their work on child welfare involvement, an issue that already concerned many community leaders and felt entrenched, with a number of upstream causes. By customizing their approach, Butte activated a large network of informed and concerned partners, sparking high levels of collaboration.

📍 In Lewis and Clark County (Greater Helena):

Child care was identified as a gap in a community needs assessment. This community-identified priority

became one of the collaboratives' goal areas.

Systems change looks different in each community and requires flexible and responsive support.

Some communities needed to build programs and services first to bring people together. In other communities, collaboratives started with targeted initiatives that addressed specific elements of systems change (e.g., parent advocacy, system coordination). Collaboratives appreciated Headwaters' approach to the work, which brought flexibility and an openness for projects (including partners, focus, activities) to shift if in service to the community.



Photo from Lincoln County

Parents and caregivers need opportunities for social connection to build supportive relationships and find common purpose. Programs and spaces that bring people together are important groundwork for systems change.

Many collaboratives focused on supporting parents and amplifying parent voices, galvanizing and connecting parents for organizing, and building their political power while fostering vibrant communities. Some collaboratives did this by creating physical spaces, holding events, and organizing gatherings to bring people together and build relationships. These spaces were key to combating isolation and forming community, giving newcomers a place to meet and creating places for connection and organizing. Physical spaces were especially helpful for grandparents and others less connected to resources or other families. The focus on physical spaces shifted during the pandemic as some collaboratives found success in

virtual spaces. These spaces and places were key to organizing, building connections, and fostering a sense of community, laying the groundwork for deeper conversations and a collective vision. This is an important lesson for systems change efforts: projects and programs are needed to bring people together.

📍 In Lincoln County:

Spaces like TFS Community Hall in Trego and local farmers' markets became hubs for connectivity. Families received support and developed trust in the local collaborative. As they connected with one another and the broader work of the collaborative, the collaborative was able to engage families more directly in its work.



Headwaters' trust-based approach, commitment to ongoing communication, flexible funding, and openness to learning and pivoting were key to Initiative success.

Local collaboratives had diverse goals and strategies, with

different relationships and varying resource and technical assistance needs. Community needs changed over time, as did the statewide early childhood system, particularly following the onset of the COVID-19 pandemic. Because Headwaters was committed to learning and changing the Early Childhood Initiative, they could shift to align with what local communities and partners needed. Collaboratives felt supported in their ability to identify and pursue community priorities and appreciated the ability to adapt over time to meet local needs as contexts changed. Many local collaboratives appreciated that they could talk through challenges directly with Headwaters and that Headwaters could serve as a problem-solver and thought partner.



Photo from Lincoln County

This trust-based approach helped local collaboratives and the statewide office focus on the work without the burden of onerous grant requirements. Because of Headwaters' flexibility and trust, everyone could be truly responsive to local and statewide needs. At times, this resulted in greater progress because there was more human capacity for the work and fewer funding restrictions or hoops to jump through.

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“An overarching lesson for us as funders was: if you want to do deep systems change work, letting go of control is the best strategy. You can't just put together a plan and then do it. It will get messy, and challenges will arise, because systems change work is work with people. Funders like to create things they can control, but that's not how this is.”

— ERIN SWITALSKI
Senior Program Director,
Headwaters Foundation



Clarity around roles and responsibilities (of Headwaters, local collaboratives, and Zero to Five Montana) was important; a lack of clarity created confusion, frustration and sometimes hindered progress.

Relationships vary among individuals and organizations, and this can sometimes create unevenness and challenges. Because the statewide office and local community collaboratives were formed at the same time, these organizations went through periods of figuring out their identities, determining how they wanted to work as organizations and with each other. It was not always clear how each partner, local collaborative, and Headwaters related to one another or how best to support one another. As the Early Childhood Initiative unfolded, Headwaters originally planned to take an increasingly 'backseat' role, but there were several moments when, due to contextual changes or challenges with relationships between Initiative partners,



Photo from Lincoln County

Headwaters stepped in to provide more guidance and direction. This dynamic created some confusion and uncertainty about which organization to turn to for a given issue or concern. This confusion over roles and responsibilities led to feelings of whiplash, loss of trust, and, at times, hindered forward movement.

Collaboratives appreciated opportunities to learn from one another; some wanted more opportunities to connect to other communities, with a more formal process to build on successes.

While partners expressed enthusiasm for the ways they informally learned, shared, and built relationships, we also heard that some wanted more opportunities to connect and to build on successes. Going forward, it may be useful to consider the balance between supporting individual community needs and identifying and supporting collaboratives' learning from each other and adapting strategies. Ultimately, each collaborative was its own pilot; there is ongoing potential to harvest successes and share them more broadly statewide and beyond.

It's important to 'build a deep bench' of advocates and leaders. An important strategy of this Initiative was investing in people, highlighting the relational nature of the work. When it came to strengthening the early childhood field at the local and statewide levels, both local collaboratives and Zero to Five Montana needed to 'build their benches' of interested, engaged advocates to lead the work. Conversely, when the right people were not in the right positions, or when positions went unfilled, this led to challenges and missed opportunities. In its early days, Zero to Five Montana experienced significant turnover,



Photo from Lincoln County

which affected progress and trust with partners. For other partners and local collaboratives, shifts in personnel sometimes affected momentum and focus. As folks left organizations, they sometimes moved to other places within Montana's early childhood ecosystem (for example, individuals moved from local collaboratives to the statewide office). This created a connected group of like-minded advocates working in roles across the state, creating new understanding and additional organizational capacities while strengthening the overall system.

Funding can create momentum.

Even in some communities with long-standing early childhood coalitions, new funding brought new energy. In multiple interviews, we heard about how this infusion of funding changed the nature of ongoing



meetings and created a sense of action and greater coordination. Investing resources in the early childhood sector creates successes that build momentum. In many communities, this influx of grant funding prompted people to take notice and

consider the sector more seriously, elevating it to a level worthy of additional investment and attention.

In Missoula County:

What had been a group of leaders strategizing together quickly became detailed plans that could be put into action.

In Butte County:

This funding led to new action on ideas that engaged those already at the table and quickly attracted new partners.

Having a dedicated and trusted technical assistance provider was beneficial for local collaboratives.

Collaboratives had different technical assistance needs and found the diverse support they received incredibly valuable. Particularly beneficial technical assistance included data and evaluation support (including surveys, social network analysis, and sourcing and interpreting data); videos to showcase projects; support for organizational development (e.g., human resources, legal support); and event planning.

While technical support varied over the course of the Early Childhood Initiative, the presence of dedicated thought-partners was incredibly valuable and contributed to the success of local collaboratives. While the statewide office initially provided technical support to local collaboratives, it became clear that Zero to Five Montana needed to prioritize its development as a new organization and make quick



Photo provided by Zero to Five Lincoln County

progress on advocacy and policy. The Center stepped in to lead technical assistance. Zero to Five Montana focused on statewide strategy and advocacy work, while engaging with local collaboratives as a partner and occasional convener and trainer.

Specific community factors enabled success

Throughout our interviews, we heard about several factors that many local collaboratives saw as key to their success.

- **Community readiness and existing structures**

This included having engaged leaders, partners, and an anchor organization in place. Communities with less structural readiness needed more time and creative thinking (including experimentation) to get the necessary structures in place.

- **Leadership and trust in relationships**

Having the right people in the right positions was crucial to success. It was also important to work with trusted community organizations, even if they were not initially seen as the 'right fit' for this work.

- **Community and cross-sector support**

Local communities considered engaging diverse sectors as vital to their success. This was a new element for these local collaboratives; previous early childhood coalitions were focused on bringing together early childhood providers and organizations, rather than engaging other sectors.

- **Community pride**

A mentality of 'get it done,' where communities had a strong culture around problem-solving and coming together. When communities want to be healthy, vital, and good places to raise children, they are motivated to improve conditions

Challenges Of The Zero To Five Initiative

While much can be learned from the Initiative's successes, its challenges also provide important lessons. This section considers the challenges that surfaced through the evaluation. Some challenges were short-lived and resolved during the Initiative, while others are deeper and require ongoing attention. We hope that naming challenges here pave the way for ongoing repair work and identify potential pitfalls that other, similar initiatives may face.

Systems change takes time; momentum can be difficult to maintain amid context changes and turnover.

Building leadership for systems change and moving forward a field with so many moving parts, organizations, and stakeholders— while also experiencing generational paradigm shifts and world-changing events— takes time, resources, and a deep commitment. At times, contextual changes and staff turnover in local collaboratives, within partner organizations, and in other parts of the ecosystem disrupted daily operations, projects, and services, and shifted the long-term vision for the work, interfering with overall momentum.

Trust-Based Philanthropy requires careful attention to relationships and thoughtful practice.

When the Early Childhood Initiative began, both Headwaters and Trust-Based Philanthropy were new. This Initiative was a major learning experience for Headwaters, its partners, and grantees. While Headwaters had clear ideas about what they hoped the Initiative would accomplish, they also wanted to support local and statewide partnership to assume leadership of the Initiative, and ultimately, for the work to be community-determined. Headwaters wanted to create space for co-design, and for new things to emerge and shift in response to the changing landscape. While this approach became increasingly important in the face of the contextual changes during the Initiative, it was also challenging for many partners, some of whom experienced it as a lack of clarity of direction or uncertainty around accountability. For many, there was discomfort with their sense of “flying the plane while building it.”

There was confusion about the roles of Headwaters, Zero to Five Montana, and The Center.

It wasn't always clear to local collaboratives what was expected of them, or who they were accountable to. There was a need for stronger communication from Headwaters, and for local communities' voices to be elevated so that Headwaters, the statewide office, and The Center could respond to their needs. Multiple collaboratives expressed uncertainty about their relationships with the statewide office and what they saw as

its evolving purpose. At times, local collaboratives were unsure whether their role was to help the statewide office clarify its work or to develop joint materials for local collaboratives. Likewise, the role and function of the statewide office was not always clear. Some thought the statewide office was intended to coordinate collaboratives and elevate parent and community voices; others felt it was best suited to statewide policy and advocacy work.

For some local collaboratives, The Center served as a bridge builder, helping the statewide office and the collaboratives understand one another. Because Headwaters funded the Center to support all early childhood coalitions and collaboratives (including those outside of the Early Childhood Initiative), The Center had to navigate relationships between coalitions with fewer resources and collaboratives with more. While clarity and comfort around figuring it out together built over time, this remained a sticking point.

Varying needs across communities and among key partners can create tensions.

Different communities and partners need different things, and this can create tensions, mismatches, and negative feelings when some efforts fail. This dynamic was true for some local collaboratives, which were working to determine their priorities while remaining responsive to the community. It was also true for The Center, as it worked to support local collaboratives and statewide efforts, figuring out how best to provide responsive, customized support while also helping partners measure their progress. And it was true for Headwaters, which learned that communities needed different support at different times for planning and implementation. These experiences were challenging for some who felt their needs were not met, and interviewees had different ideas about how these dynamics might be alleviated. Some wished that Headwaters had taken a stronger leadership stance; others wanted more consistency across collaboratives.

Collaboratives' experiences with technical assistance varied.

All collaboratives found the available support valuable, while some wished for additional support. The technical assistance offered varied throughout the Initiative in response to changing needs, turnover at The Center, and shifts in roles and responsibilities over time. Some early efforts, such as social network analysis (which some collaboratives found helpful), were discontinued. Later efforts to provide custom evaluation and strategy coaching may have benefited the collaboratives more if they had been offered earlier in the Initiative.

Some communities experienced tensions between the "old" and new" efforts.

Many communities had existing early childhood coalitions or other partnerships predating this Initiative. Interviewees frequently mentioned rising tensions as partners and communities worked to make sense of the changing early childhood landscape and to navigate Headwaters' funding decisions. Some coalitions felt overlooked when they were bypassed

for funding in favor of new or emerging groups. Some collaboratives experienced challenges with Zero to Five Montana and other statewide partners, feeling a mismatch between what was needed (or possible) locally and what was advocated for at the state level. There is a need to improve these relationships moving forward. We heard about the importance of paying attention to context and power dynamics, and the need to nurture and protect relationships. Montana is a place where folks know each other and are used to working together. The ongoing success of the early childhood sector will partly depend on the health of these relationships moving forward.

While there is deep gratitude for this funding and widespread recognition of its importance, a large influx of funds can create unintended consequences. Funding can affect community and relationship dynamics and create unsustainable structures in the long term as funding declines or ends. For the early childhood coalitions and communities that were not funded, or for the anchor or statewide organizations not selected to host these grants, there were other challenges. In a field with insufficient resources and generational work, this can create fraught dynamics that inhibit collaboration or prevent the field from moving forward. This can be helped by fostering honest relationships and doing the necessary repair work.

Large grants can be logistically challenging for organizations when existing systems are not accustomed to handling large funding amounts.

This was particularly true in some under-resourced rural communities, and some anchor organizations had challenges processing or utilizing funding. Several collaboratives suggested that, in some communities, it might be appropriate for a backbone organization or fiscal sponsor at the statewide level (outside that community) to support local work in rural areas that lack existing infrastructure. In other cases, collaboratives were able to build necessary infrastructure over time. In both cases, having sufficient budget and time to plan, test, and change course as needed was vital to their success.

Some collaboratives identified missed opportunities for collective impact work.

In some ways, this is in tension with the Early Childhood Initiative's commitment to local community control. When collaboratives focus on different goals and strategies, it can be difficult to align around a common purpose or vision. Some interviewees felt there were missed opportunities to work under a collective impact model to create more structure, clarity, and opportunities for sharing across collaboratives. Some felt that systems were missing to elevate the wins of local collaboratives or encourage replication.

Tracking progress proved more complex than expected.

A six-year initiative can seem like enough time to see big, systemic changes and dramatic outcomes. But that work takes a long time, especially when large shifts in context occur simultaneously. Each local collaborative chose its own goals, strategies, and activities, reflective of its communities' needs and strengths. These also changed over time, as collaboratives evolved and remained responsive to their communities. As a result, it was difficult to track progress and outcomes, and to determine attribution (within or across communities). This is a reality of systems change work: it takes time, operates at multiple levels, and considers the many, varied contributions to any changes we may see. In the absence of certainty or consistent measurement, it can be difficult to quantify progress or communicate the importance of this work.

Sustaining local collaborative looks different by geography.

While The Center provided support for collaboratives focused on sustainability, the results were mixed. Not all collaboratives were prepared for funding shifts by the Initiative's end. Ongoing funding is needed to continue positions and programs, particularly those that were newly built or expanded. For some collaboratives, it is unclear where ongoing funding will come from. In our interviews, some partners discussed the ever-changing nature of the early childhood funding landscape and felt that organizations (including collaboratives) need to be nimble and adaptable to these changes. Others emphasized the need to build stronger partnerships between philanthropy, DPHHS, and community organizations, and the importance of long-term funding and partnership to create real change.



Case Study I

[VIEW LINCOLN COUNTY COLLABORATIVE TIMELINE HERE →](#)

A Deeper Look At The Lincoln County Collaborative

Lincoln County is the beautiful upper NW corner of Montana. Home to dense forests and scenic rivers, Lincoln County was once economically driven by the timber and mining industries but is now better known for outdoor recreation. As of the 2020 census, there were fewer than 20,000 people living across the county. Lincoln County's relatively low population and its mountainous landscape mean that even the larger communities can feel remote and isolated.

From coalition to cross-sector collaborative

Prior early childhood coalition efforts in Lincoln County were unable to foster robust cross-sector collaboration and ultimately dissolved. When the Zero to Five Initiative launched in 2018, Lincoln County Health Department was identified by community leaders and partners as the organizational home for a new collaborative, and Zero to Five Lincoln County (Zt5 Lincoln County) was established. A team of 25 people, representing a wide range of organizations and communities, worked together to design Zt5 Lincoln County.

A relationships-first leader

The Health Department quickly identified a coordinator for this new and expanded collaborative, Dorey Rowland. Dorey focused on establishing and rebuilding trusting relationships with community leaders and families, spending hundreds of hours meeting people and learning about community needs and opportunities. Dorey connected people to Zt5 Lincoln County and to one another, especially when she could do so across communities. With her positive, reliable, relationships-first approach, Dorey became a 'beacon' for young families throughout the county. This leadership proved vital to the collaborative's robustness.



Dorey Rowland next to Lincoln County Connections Resource van.

The collaborative grows and sets an ambitious goal

Zt5 Lincoln County attracted broad representation, including those working in prevention, those outside of typical public health or education systems (such as farmers' markets), and organizations that had not previously coordinated or collaborated. During the COVID-19 pandemic, membership expanded as the Collaborative met virtually and organizations realized the importance of working together to meet increasingly complex community needs. Collaborative meetings consistently attract 20-25 people, a remarkable size given the rurality and geographical spread of the county; previous coalition meetings often saw just 4 or 5 attendees.

The collaborative set an audacious goal— that by 2026, all families with young children would have meaningful engagement with an Early Childhood (Zt5) outreach effort or program. The group wanted to build a county where all families with young children are valued, connected, and empowered through community-supported families, regardless of their socio-economic status or geography. This goal stuck. Zt5 Lincoln County used a variety of interrelated and complementary approaches to work toward it throughout the Initiative.

Wide-ranging intentional approaches and impacts

The interrelated and complementary approaches of the Collaborative included:

- **Generating early momentum through “quick wins”:** Zt5 Lincoln County intentionally identified ‘quick wins’ beginning early in the Initiative— relatively easy solutions to meeting basic family needs or creating strategy connections between established organizations. Sometimes all it took was providing diapers in a community or nudging an organization to expand access to its spaces or programs to make a big difference in the resources available to families and children. These efforts proved that small, purposeful investments could be deeply impactful, improving access, generating new resources for young families, and shifting relationships and power dynamics. Showing up to meet the needs of families and partners helped build momentum and establish trust.
- **Building trust by under-promising and overdelivering:** It was also important to Zt5 Lincoln County to remain grounded in reality and avoid over-promising what was possible. The slogan of “under-promise and over-deliver” became a calling card of the collaborative and helped ensure the group was growing their work sustainably and continuing to build or maintain trust.
- **Expanding visibility and bridging distances across the county via a mobile resources van:** In 2022, Zt5 Lincoln County successfully advocated for county investment of both local and American Rescue Plan Act (ARPA) funding in a Community Connections van to provide mobile resources (e.g., basic supplies, prevention &



education resources) for families throughout the county. This investment was also leveraged as the Collaborative received a grant from LOR Foundation to include movement kits and play equipment to encourage physical activity. The van became a highly visible and well-known resource at farmers' markets throughout the county. This increased awareness for early childhood and young families and solidified Zt5 Lincoln County's accessibility and value to communities across the county.



- **Sharing ownership:** Zt5 Lincoln County's approach was grounded in close collaboration with partners and families throughout the county, building on existing strengths. Ownership and implementation of this work were centered on partners rather than the Health Department to shift resources and build capacity that could be sustained beyond the Zero to Five Initiative. For example, farmers' markets, which are a cornerstone in communities across the country, became a key opportunity to reach young families. Zt5 Lincoln County facilitated activities, provided resources, and helped families connect to one another and broader community resources through Kids Corner at the Market in multiple communities across the county.
- **Building partner and community capacity:** To further support partners and ensure that outreach and resources were of high quality, the collaborative also offered workshops in various parts of the county on community engagement and program implementation, grounded in existing research.
- **Expanding awareness and possibility:** The Collaborative's approach and intention to be wide-reaching also created opportunities to build awareness of the needs and strengths of young families throughout the county. It also stretched everyone's thinking about what was possible, shifting mental models and ideas about young families among community leaders and increasing the resources available to families. For example, Zt5 Lincoln County encouraged the city of Libby to expand its plans for a new playground to be more inclusive, with accessible equipment for children of all needs and ages. The Collaborative used funding from the Headwaters grant to cover equipment for children 0–5, and from LOR Foundation to cover equipment for children with different abilities. They helped county leaders see that building a more inclusive playground would be more efficient and cost-effective and would benefit the whole community. The city led the project and also brought in private funding.

- **Letting go when it doesn't work:** The collaborative's wide-ranging approach to supporting partner efforts also meant that not everything that Zt5 Lincoln County supported worked. For example, community-driven efforts to expand a local public library's offerings were halted when the library lost local funding and had to reprioritize its resources. This was an important lesson and reinforced the group's approach as a supportive partner, rather than a leader or driver. "We had to let things have their own lifespan."



- **Engaging families as leaders:** Zt5 Lincoln County recognized that families were best positioned to decide what was needed and how to make it happen. Casey Fuson is a great example of such a parent leader. After connecting at Kids Corner at the farmers market in Trego, Dorey encouraged Casey to get involved. After visiting and volunteering with other early childhood programs in other parts of the county, Casey was inspired to start a playgroup and resource hub for families in Trego, a small community of about 500 people. The Collaborative provided \$2,400 in funding to jump-start Trego Learn and Play in Spring 2022, utilizing free space at the TFS Community Hall. The program was a huge success, serving over 150 children to date, with some families traveling long distances to participate. Casey says one key to the program's success is how welcoming it is to all families – "dads and grandparents and foster parents need somewhere to bring the children in their care, too."

”

“My sister-in-law shared that when her kids were little, there wasn't anything for them to do. Having Trego Learn and Play is huge. There is so much for [my child] to do when we go there. It is so well planned and organized, it is well worth the 40-minute drive.”

LINCOLN COUNTY PARENT/CAREGIVER



Due to the success of Trego Learn and Play, Casey launched Trego Community Classroom in 2025, providing the first licensed non-Head Start preschool program in north Lincoln County. This example also underscores the importance of the Collaborative seeing families as strong, capable, deserving, and powerful, as well as the power of physical spaces to help families build connection and mitigate isolation.



The intentionality the Collaborative took in its work is clear in all these elements. As Casey Fuson said, “That intentionality and focus on quality is what made outreach successful, made connections thrive, and it’s why we reached so many young children in every corner of the county.”



A more connected and collaborative county, for the benefit of all families

The examples shared here illustrate the intentionality of Zt5 Lincoln County efforts. Early ‘quick wins’ and relationship building helped the Collaborative engage in broader change efforts later. Supporting partners in taking the lead in their own communities helped ensure that efforts would be sustainable. As Dorey approached retirement in 2024, the Collaborative already had team members ready to step into bigger roles. Alissa Fifield became the new Collaborative Coordinator, Lucy Orr stepped into the Project Coordinator role, and Casey Fuson took on the Family Engagement Coordinator role in Trego. Shayla Montgomery and Crystal Clutter continue to play important roles as well. The effort to keep Zt5 Lincoln County



focused and moving forward is truly a collective one, illustrating how people and systems across Lincoln County are now connected, coordinating and collaborating in ways they weren't before this work.

”

“Monthly collaborative meetings have changed what it feels like to work here. I feel informed, and I know who else is working toward the same goals. The county feels smaller because we're all connected.”

- CASEY FUSON
Lincoln County



The increased coordination and collaboration, improved community cohesion, and mitigated isolation were made possible because Zt5 Lincoln County centered families' basic needs and partnered to provide the resources needed in specific communities. The programs and services the Collaborative made possible were critical, and the Collaborative's positioning as a partner and resource, rather than as the sole owner of efforts, was vital to the sustainability of the work beyond the broader Initiative timeline.

By modeling collaboration, it paved the way for organizations to not just share information with one another, or even to coordinate, but to truly work together for the benefit of families in the county. In doing so, the Collaborative has “shone a light on early childhood,” shifting mindsets and building a shared understanding of the importance of those early years and of the strengths and needs of young families.



All photos provided by Zero to Five Lincoln County

To learn more about the Lincoln County Zero to Five Collaborative, visit <https://www.zerotofivelincolncounty.com/>



Case Study II

[VIEW PROJECT TIMELINE HERE](#) →

Community Readiness And Cross-Sector Coordination In Missoula

Missoula County is the third-most populous county in Montana, home to 122,500 residents.¹ The city of Missoula is the most populous city in Western Montana and the second largest in the state. Missoula is a coveted location for recreation activities and is also home to the University of Montana, the county's largest employer. Missoula has the advantage of being a resource-rich environment, with many services for children and families not found in more rural locations. As of 2026, there are over 1700 registered nonprofit (501c3) organizations just within Missoula City, which is 14 percent of the total registered nonprofits throughout the state.² Like the rest of Montana, Missoula has been struggling with affordability issues that have worsened since the COVID-19 pandemic and an ever-increasing cost of living (particularly median home prices and rental costs). In 2019, Missoula's early child care providers could serve an estimated 50 percent of children under age 6 whose parents were in the workforce, and only 38 percent of infants and toddlers.³

Early History And Partners

Before the Early Childhood Initiative, Missoula had an early childhood coalition, Healthy Start Missoula, at the Missoula City-County Health Department (now Missoula Public Health). Healthy Start Missoula administered home visiting, WIC, and other services for young children and families. A cross-sector group of community, university, and philanthropic leaders was exploring ways to strengthen cradle-to-career outcomes. In 2017, with a small grant from the Washington Foundation and facilitation support from Deb Halliday, the group identified collective impact as a promising strategy for improving outcomes. They recognized an opportunity to build stronger connections across systems that support

¹ U.S. Census Bureau. "ACS Demographics and Housing Estimates" (DP05). <https://data.census.gov/table/ACSDP1Y2024.DP05?q=missoula+county>

² Internal Revenue Service. "Exempt Organizations Business Master File Extract " <https://www.irs.gov/charities-non-profits/exempt-organizations-business-master-file-extract-eo-bmf>

³ U.S. Census Bureau. "RACE." Decennial Census, DEC Redistricting Data (PL 94-171), Table P1, <https://data.census.gov/table/DECENNIALPL2020.P1?q=Missoula+County,+Montana>. Accessed on 3 Dec 2025.

children and families, particularly in child care and education, and began exploring coordinated approaches.

In 2018, when funding became available through Headwaters' Early Childhood Initiative, the informal coalition saw an opportunity to formalize its structure and move ahead with the early childhood portion of its work. Headwaters led a series of community and stakeholder meetings, and the community chose United Way as the anchor organization for the new Zero to Five Missoula. Grace Decker, a longtime early childhood educator and advocate with broad experience, became the Strategic Collaboration Coordinator. From the beginning, the collaborative emphasized partnership and cross-sector involvement. Within its first several months, the new collaborative held six large community meetings with over 80 organizations to solidify its plans based on the existing collective impact framework.

During the first year of funding, the team assembled a high-level strategic advisory committee, Resource and Support Champions, known as "the RASCals." This group included the head of the Washington Foundation, the superintendent of Missoula Public Schools, a county commissioner, representatives from Missoula Economic Partnership, Families First, Watson Children's Shelter, Youth Homes, the dean of the University of Montana College of Education, and others. As ambassadors and advisors, the group added credibility and clout to the new collaborative while leveraging their influence to secure additional resources, address barriers, and green-light emerging solutions.

Key Initiatives And Outcomes

Zero to Five Missoula quickly built on the work of the previously convening partners, who had already identified three key focus areas for their systems change work:

- Connection between early childhood and K-12
- Thriving and engaged families (access to services and engagement in leadership and decision-making)
- Access to child care

“We launched projects that have a life of their own and are making a substantive difference in people’s lives.”

- GRACE DECKER

Former Zero to Five Missoula Strategic Coordinator





Starting in 2019, Zero to Five Missoula launched a series of programs and initiatives to create systems-level change in Missoula and beyond. All the programs, which continue to operate in Missoula, are what the collaborative highlighted as foundational to ongoing success. These programs include:

- **Kindergarten Early Assessment (KEA):** was piloted in the 2019/2020 school year and scaled over the next few years. The assessment, which focuses on child readiness for kindergarten across social and emotional (SEL) and academic domains, immediately began providing shared data to understand the impact of early experiences on school readiness. The data helped identify where the current system was and was not meeting the needs of families, allowing a wide range of partners, including individual teachers, school districts, and public institutions, to better prioritize curriculum and services to fill gaps. Key outcomes: Shared data across systems to assess the needs of children and families and provide more targeted services to meet those needs. Successful leveraging of data for shared decision-making and prioritization.
- **Parent Leadership Training Institute (PLTI):** is a national program that helps parents develop leadership and advocacy skills to influence change in their communities and beyond. Zero to Five Missoula launched PLTI in 2021 and has supported annual cohorts since. Participants increased their connections to other parents and community leaders, learned about new resources, and practiced skills to advocate for children and families. Parents appreciated that the program provides child care, food, transportation, and personalized mentorship, reducing barriers to participation. As of Fall 2025, 42 caregivers have completed the program. One parent participant talked about how the inclusiveness of the program, including the option for on-site child care, had ripple effects: *“If you bring your kids into what you love, and if it’s part of your community, then you’re going to plant a seed within your children for also them having that love for community. And so it was nice to have that.”* Key outcomes: increased parent participation in local and statewide advocacy, more resourced and connected parents.



“We have a growing group of parents who have been trained in how to understand systems, make change, and advocate for their families. For a while, a lot of other orgs were approaching us, really interested in PLTI, but they wanted to train parents to be advocates for their particular focus. So, they wanted parents who were going to advocate for access to food, or they wanted parents who were going to advocate for a healthy climate. Because PLTI is the parents’ own focus, I think we have influenced every single one of those areas.”

—GABRIELLE SATHER-OLSON,
Deputy Director & Director of Zero to Five Missoula

- **Early Learning Fellows (ELF):** is a cross-sector cohort of professionals who come together throughout the year as a learning community, sharing resources, experiences, and best practices relating to early childhood. The goal is to build connections between systems and engage in collective action to better serve children and families. ELF launched in 2021 in partnership with the University of Montana College of Education, Missoula County Public Schools, and child care providers. So far, 116 fellows have participated. Key outcomes: more cohesion and coordination between systems that serve children and families. Fellows gained experience and confidence advocating for children and families, learned to use the KEA and other data to inform practice, and built relationships to more effectively serve children and families. Starting in 2025, ELF is slated to expand to Bozeman.

Challenges And Solutions



“I don’t think I’ve ever worked at a job where there is so much yes.”

—GRACE DECKER,
former Zero to Five Missoula Strategic Coordinator



While all systems change work comes with challenges, Zero to Five Missoula worked through shifts and challenges as they arose.

- Before the Early Childhood Initiative, Missoula had an existing early childhood coalition, Healthy Start, located at Missoula Public Health. The initial decision to fund United Way as the anchor organization caused tension and necessitated careful leadership and partnership to ensure the community remained united in its shared vision and that initial challenges did not lead to long-term consequences. Ultimately, Zero to Five Missoula and Healthy Start were able to build inroads and work together.
- The COVID pandemic revealed where systems were lacking in Missoula. School and child care closures, changing public health recommendations, and economic challenges made the need for sharing relevant information across sectors increasingly acute. Zero to Five Missoula built on its relationships across sectors (including healthcare, K-12 education, child care, business, economic development, and local government) to quickly organize and facilitate a Missoula County Child Care Task Force, which met daily for several weeks, then multiple times per week for months, and finally weekly for almost 18 months. The task force delivered timely information and resources, helped establish numerous lasting partnerships, and positioned Zero to Five Missoula as the go-to for information and strategies on child care.

Building Upon Early Wins: Missoula Child Care Advantage

In the spring of 2022, Montana DPHHS released a notice of a unique grant opportunity. Innovation Grants would be awarded to projects that involve collaboration or partnerships and propose to expand a community's number of child care slots. Zero to Five Missoula convened stakeholders and potential partners and launched Missoula Child Care Advantage (MCCA). This program enables child care organizations to save costs and access resources through shared services, and empowers employers to provide their employees with quicker access to childcare.



Former MCCA Coordinator Sally Henkel and son

The MCCA coordinator was co-funded by the City and County, marking the first substantive investment in the child care sector. Zero to Five Missoula also secured several other grants and donations for the project. For the Zero to Five Missoula team, this series of interconnected wins signaled tangible progress. They pointed to the systems change they'd been working toward: moving from shared concerns to collaborative action.

Key factors that led to success

When asked about what led to Zero to Five Missoula's success, the team cited several key contributors:

- **Community readiness or taking root in 'fertile ground':** Missoula entered the Initiative with a high level of clarity and buy-in about its goals. They continued to work on the same systems goals over time, with consistent leadership throughout the project. Likewise, the broader community and residents in Missoula were generally receptive.
- **Collaboration:** Missoula is an environment where folks are used to collaborating. Still, there was a high level of intentionality in working together, and to build a shared vision that inspired people and organizations to transcend the natural territoriality common when organizations must compete for limited funding.
- **Leadership:** Susan and Grace were already well-respected and well-connected leaders in the community, and they adopted an inclusive approach that welcomed diverse partners. The RASCals added high-level support, resources, and championship; they were able to identify and address barriers.
- **Funding and structure:** The Missoula team thrived on the flexibility Headwaters provided, allowing them to experiment and innovate while tapping into the broader network of resources and support. This ability to innovate was enhanced by the stability and structure of their anchor organization, United Way.



“The flexibility from Headwaters gave us the responsibility to develop something, but also the authority to do it the way we saw fit [and] led us to try out a bunch of things without having to ask for permission at every single thing. That really has helped the initiative grow and succeed, that we’re able to have autonomy while still being part of a bigger movement.”

—SUSAN HAY PATRICK,
CEO of United Way



Looking Forward

Zero to Five Missoula continues to run and expand projects. The organization is considered a vital leader in Missoula’s early childhood sector and among collaboratives. Since its start in 2018 with the first Strategic Collaboration Coordinator position, the Zero to Five Missoula staff has grown to a team of 2.5 FTE.

Given the collaborative’s far-reaching projects and expanded size, funding remains a priority. With ongoing threats to government funding, Zero to Five Missoula will continue to seek creative collaborations between community organizations, foundations, and businesses to sustain and grow their work. This includes working closely with Healthy Start Missoula, the early childhood coalition at the Missoula Public Health Department. Beyond sustaining, Zero to Five Missoula is interested in continuing to build on its local wins and supporting other communities in replicating what has worked for them. Leaders are interested in involving families and the broader community in reassessing next steps to determine what will be most impactful and desired.



“My passion would be moving forward, would be to take all the results of everything we’ve learned and use it to educate the public and policy makers about the state of early childhood, which I don’t think we’re doing right now—I think it’s still too piecemeal—and then really make Montana the best place to raise a kid.”

—SUSAN HAY PATRICK,
CEO of United Way



To learn more about Zero to Five Missoula,
visit <https://missoulaunitedway.org/zero-to-five-missoula/>



PART 4

Conclusion & Reflections

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Early Childhood In Montana – *After The Initiative*

While we’ve seen remarkable progress in the early childhood sector over the past several years, many Montana families still lack the structural support they need to thrive. At the same time, this progress is worth celebrating.



Photo from Trego Farmer's Market.

We are seeing positive changes at both the local and statewide levels. With the establishment of its early childhood endowment, Montana is considered a leader in early childhood, providing models for other states to learn from.¹⁵ Over the past few years, public interest in early childhood and public investments have increased, with more policies in place to support Montana families.¹⁶ The Early Childhood Initiative and its partners have contributed to these substantial improvements. New policies will take time to implement and be reflected in early childhood metrics and outcomes. There is still structural work to do before Montana’s early childhood sector can meet the robust, healthy, and vibrant vision that many in the sector still hold. Still, there is clearly excitement in the sector for its new capacity, stronger structures, and the relationships that have been built, along with a sense of forward momentum and unified voices to continue advocating for Montana families.

The Early Childhood Initiative shows what is possible when funding is flexible and responsive, when local voices are lifted up, and communities determine and meet their own needs. Access to resources for young families has improved at the local level in ways that are responsive to local conditions. The Initiative contributed positively to systemic changes and to Montana’s early childhood policy landscape at both the local and statewide levels. Through the structures built and changes catalyzed, some conditions have shifted toward organizing and building power in Western Montana communities around early childhood issues. Leaders have emerged, and individuals and organizations within communities are more connected; there is a pipeline for local-to-state advocacy work that did not exist before.

¹⁵ <https://earlysuccess.org/new-montana-early-childhood-revenue-stream-2025/>

¹⁶ https://zerotofive.org/wp-content/uploads/2025/06/2025-Exec.-Summary_External.pdf

Still, the work is not without challenges.

Some are the result of dynamics predating the Early Childhood Initiative, while others were unintentionally caused or exacerbated by the Initiative, its implementation, and funding decisions made by Headwaters and others. There is a need for ongoing trust-building and repair work to overcome past challenges and navigate ongoing contextual shifts.

While organizational roles and responsibilities have become clearer over the past few years, some questions remain about ongoing roles within the early childhood system.

- *What might it take for early childhood organizations and various partners to overcome prior tensions?*
- *How can statewide organizations continue to build a strong pipeline to bring local ideas and experiences to the statewide level?*
- *How can Headwaters and other funders support partners' successful relationships and ongoing collaboration?*
- *What role could Headwaters (and other funders) play in the early childhood ecosystem over the long term?*
- *What might it take to sustain this work over time while keeping Montana families at the center?*

The context of this work, the funding landscape, and our world have changed dramatically since the Early Childhood Initiative began in 2018. These considerable changes make it even more remarkable that the Initiative contributed to the kinds of positive changes it originally sought. As the early childhood landscape continues to experience upheaval and change, there is a need for clear communication and collaboration, a deep desire to sustain what has been built, and ongoing resources.

Across interviews, participants emphasized the importance of relationships, the trust and time required to sustain this work, which many see as generational. Collaboratives need ongoing support to maintain momentum toward shared goals. Whether to continue with existing structures or to support

structures' evolutions, collaboratives need continued funding for staffing to support coordination and facilitation.

Carrying these lessons forward



“Looking forward, the local coalition infrastructure is vital to continuing to build a network across a state as large as Montana.”

— TRACY MOSEMAN,
DPHHS

Headwaters has taken lessons from the Early Childhood Initiative to refine its thinking about how to support Western Montana communities and its role in supporting the early childhood sector. Among these lessons is the importance of centering community voices to drive change, ensuring that the people most impacted by the issues are at the center of solutions.

While the Early Childhood Initiative has formally ended, much of its work continues. Zero to Five Montana continues to play an important role in supporting local collaboratives, serving as a conduit for them to engage in state-level advocacy. The Center continues to work alongside Zero to Five Montana and local collaboratives.

Additionally, many local collaboratives are projected to receive additional funding from Headwaters, as their work aligns with Headwaters' priorities and its new funding stream, the Family Power Fund, which Headwaters launched in 2025. The Family Power Fund supports community-based organizations that develop and engage leaders, drive advocacy for health-focused policies, and amplify stories that reveal health challenges and inspire solutions. This includes multiple, interconnected strategies: building family leadership and belonging, centering the voices of families most affected by issues; supporting organizing and advocacy work; and shifting narratives to catalyze policy solutions. Many local early childhood collaboratives are well-positioned to carry out this work in their communities.

Final Thoughts From The Evaluation Team

As Headwaters, local community collaboratives, and other partners continue building a stronger early childhood system, we encourage them to remember the lessons of the Early Childhood Initiative— and to hold on to the excitement, momentum, and new capacity that they have built within this sector.

As other funders embark on similar endeavors, we hope the stories and insights shared in this report are useful, and that they feel encouraged to adopt the ideas of Trust-Based Philanthropy, trusting their local partners and keeping those closest to the work at its center. To all readers, we offer the following reflective questions to support the application of the findings presented in this report.

- What does it mean to work collaboratively toward shared goals in the context of systems change? What might it take to build the clarity and trust required to do so?
- How can we design initiatives to allow for flexibility in rapidly changing contexts, while holding onto enough clarity around goals to maintain focus?
- What are funders' responsibilities to funded partners and communities? How can funders foster mutual accountability and build transparency and open communication?
- How can leaders hold onto the accomplishments, challenges, and lessons from time-bound Initiatives as they continue systemic change efforts?

About The Evaluation

This evaluation was led by LAS Visions and The Camassia Group, independent research and evaluation practices working in partnership.

We designed this evaluation to be collaborative and inclusive, taking an intentional approach considering Headwaters Foundation and the Early Childhood Initiative's context, history, and impacts. We centered the perspectives of the individuals impacted by the Early Childhood Initiative - both those working within the early childhood landscape in Montana and young families, whenever and however possible. We identified themes across local community collaboratives and the statewide office while exploring communities' unique stories, contexts, and outcomes.

Our work was informed by the frameworks that influenced the Initiative: Trust-Based Philanthropy's principles and practices; collective impact and systems thinking/systems change; and equity-driven evaluation (e.g., the Equitable Evaluation Framework™). Recognizing that objectivity and neutrality are false

expectations of evaluative work, we also aimed to ensure that both the methods we used - the process of the evaluation – as well as its result – this report – would be beneficial to all involved; not only avoiding harm to the individuals and the ecosystem, but with the intention that this work has a positive influence.



A set of evaluation questions guided our work

Questions about the Overall/Statewide work:

- How did the vision of the work evolve over the 6+ years? What adjustments were made along the way?
- How has the early childhood landscape in Montana changed over the past six years?
- What are the biggest challenges and lessons learned at a statewide level?
- What is still needed to support the early childhood field in Montana?

Questions about the Local Collaboratives:

- What successes and challenges did local collaboratives experience, and why?
- What were the outcomes of the local collaboratives?

Questions about Headwaters Foundation:

- What has Headwaters learned through supporting this Initiative?
- How can this Initiative inform future work and decision-making?

To explore our evaluation questions, we engaged in a variety of evaluation activities over six months, including:

- **A document review** of over 100 Initiative

documents, including grant applications, workplans, grant reports, strategic planning documents, background literature, and more, shared by Headwaters Foundation, Zero to Five Montana, and local collaboratives.

- **Individual and small group interviews** with 28 current or past employees of seven local community collaboratives, Zero to Five Montana, Headwaters Foundation, and key partner organizations, including DPHHS and UM Center for Children, Families and Workforce Development. Interviewees shared successes and challenges, providing a deeper understanding of the community's context, goals, and accomplishments.
- **Two parent/caretaker focus groups**, totaling 13 participants. Participants shared stories of their experiences, reflected on what has changed, and talked about how their communities can best support families and young children.
- **Two sensemaking sessions** with a total of 19 participants. These sessions included opportunities to review and respond to preliminary findings. Participants engaged in rich discussions, correcting, adding nuance to, and validating findings.

A Partnership-Driven Evaluation

We worked closely with Headwaters staff to complete interest-holder mapping, refine evaluation questions, and understand their perspectives on the Initiative. We also worked with a five-member Evaluation Advisory Group, which reviewed our methods and plans to ensure they were relevant, culturally appropriate, and inclusive. They helped identify interviewees, vet preliminary findings, and review the draft report

to ensure it reflected multiple experiences. It's important to note that Evaluation Advisory Group members, focus group participants, and sensemaking participants were offered compensation for their time and expertise. Compensation was either provided to the individual or their employer, depending on the circumstances of their participation.

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Thank you to everyone who makes
early childhood better in Montana.



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