



OGF President George E. Espy and Ohio Governor Ted Strickland at OGF's education conference.

Beyond Tinkering in Education Reform

Overview

It was one of the most formidable challenges ever undertaken by a regional association of grantmakers when the Ohio Grantmakers Forum (OGF) set a goal in 2005 to help substantially restructure the state's educational system through creative, systemic and sustainable reforms.

The effort was aimed at ensuring students not only graduated high school, but had the necessary knowledge and skills sets to attend post-secondary institutions or successfully enter today's—and tomorrow's—highly competitive workforce.

To succeed, OGF not only had to bring together sometimes philosophically opposed leaders from the educational, philanthropic and political sectors, but secure unprecedented buy-in and commitment from each on an agreed upon set of reform measures that would challenge and change the very foundation of the education structure in the state.

At the outset, and based solely on Ohio's historical record of slow-moving sweeping social and educational policy change efforts, few outside the foundation sector held any hope for success.

But in 2009, OGF and its team surprised virtually everyone.

First, member foundations took a leadership role by funding \$300,000 over three years to support its *Education Initiative*. Then came a series of convenings, strategy sessions, communications planning, political outreach, partnership-building and research to inform the work.

Thanks to their untiring efforts, as Ohio's biennial budget was being developed in 2009, OGF and its partners worked with the governor and his advisers, state legislative leaders, members of the education committees in both chambers, the state Board of Education and others to ensure that its recommendations were included in the state's 2009 education reform agenda.

“Foundations need to understand they can be an innovative catalyst for change... and the force that brings everyone together in a unified effort.” —Helen Williams,
The Cleveland Foundation

Throughout its continuing work, OGF supported members' efforts to become more effective education grantmakers by offering seminars for funders, facilitating the sharing of best practices and creating opportunities for foundation leaders to stay engaged with Ohio's education policy officials.

RAISING AWARENESS

These six case studies demonstrate the value and benefits of regional associations and their members engaging policymakers at the local, state and federal levels. PolicyWorks is designed to build the capacity of regional associations by: (1) raising awareness; (2) building skills and systems; and (3) catalyzing action. In doing so, PolicyWorks envisions that regional associations will become valued voices and expert resources on issues critical to philanthropy and society.

- ➔ **Beyond Tinkering in Education Reform**
- ➔ Opening the Charitable Spigot
- ➔ Building the Bridge
- ➔ Striking a Compromise
- ➔ Forging a Partnership
- ➔ Supporting Nonprofit Partners

Challenge

OGF President George E. Espy says one of the catalytic events leading to the education initiative was the release of a U.S. Department of Education report that found for the first time American children today are less likely to graduate from high school than their parents were. “For more than a decade Ohio has pursued significant education reform and substantial progress has been made in establishing academic content standards to define what students need to know and be able to do to be successful after high school,” says Espy.

But in spite of this progress, he says, “We know that our work is not done when we realize that the U.S. is in the bottom third educationally when compared to other industrialized countries...and our children’s graduation rates are among the lowest ever. Surely, being at the top of the bottom third is not good enough for Ohio’s students.” That was—and remains—the challenge facing OGF and its foundations, says Espy.

Strategies

Launched in 2005, OGF’s *Education Initiative* was designed to provide leadership by engaging policymakers and other stakeholders to improve education while enhancing the ability of OGF members to make effective education grants.

“These are not separate, but rather integral purposes and both are driven by a desire to improve the conditions of learning for every student in every Ohio community,” says OGF’s Board Chair Heidi B. Jark, vice president and manager of the Foundation Office at Fifth Third Bank.

Espy says the OGF team recognized immediately there were four key elements to success that had to be incorporated in all its strategic decisions: engaging members, establishing relationships with key legislative leaders, bringing together the many stakeholders—some who had never met—and finding, developing and disseminating the best research possible.

Designing a strategic plan to accomplish its goals, he says, flowed easily from OGF’s mission: to provide leadership for organized philanthropy in Ohio and to enhance the ability of members to fulfill their charitable goals.

“From the initiative’s start, we had no illusions about the magnitude of the challenges confronting us,” says Espy. “We understood that bold action and an accelerated pace of improvement were needed. And we knew that we’d have to remain patient without losing our sense of urgency.”

As part of its strategic efforts, OGF in December 2005 provided Ohio’s education policy leaders a report, *Education for Ohio’s Future*, an independent, comprehensive review of the then-state of public education in the Buckeye state.

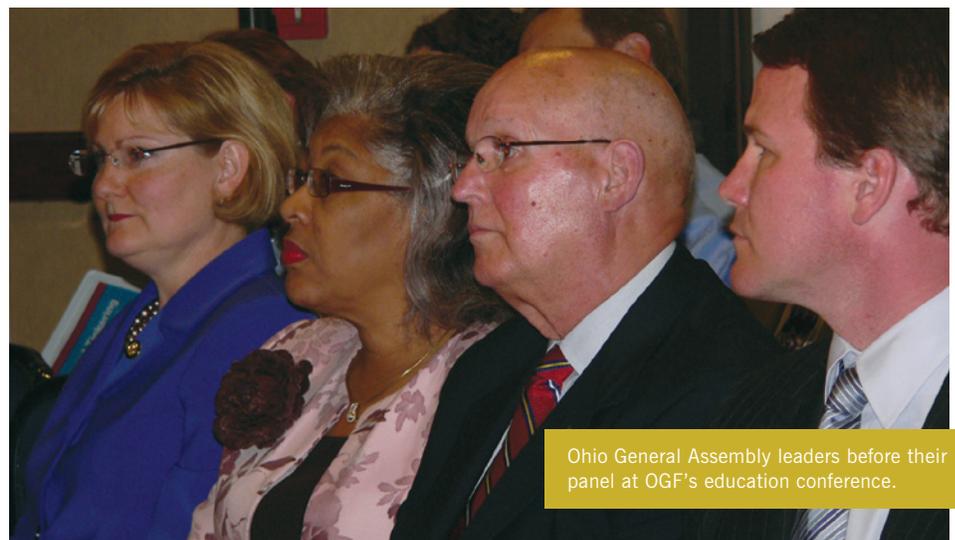
That report found that: only about one-third of Ohio’s K-12 students were meeting the National Assessment of Educational Progress’ international standards; persistent low achievement levels by minorities and low-income students posed a huge societal challenge; two-thirds of new 21st century jobs require some post-secondary education; and only 25 percent of Ohio’s residents had a four-year college degree, ranking it 38th nationally.



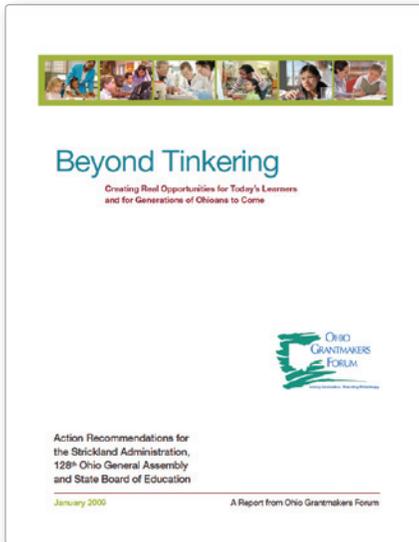
Following the report’s release, OGF held a statewide conference and 10 regional conversations that brought together community leaders throughout Ohio to discuss the implications of state education reform for students and schools in their local communities.

OGF convened two workgroups composed of 43 people from 33 stakeholder organizations, including grantmakers, school board members, principals, superintendents, employers, educational service centers and community-based organizations to reach consensus on policy recommendations.

“We timed this work to coincide with the ongoing efforts of Governor Ted Strickland and his staff—and of state legislators on both sides of the aisle—to develop a comprehensive education reform plan for Ohio,” says Espy.



Ohio General Assembly leaders before their panel at OGF’s education conference.



As part of its strategic efforts, in January 2009 OGF and its partners issued a report, *Beyond Tinkering: Creating Real Opportunities for Today's Learners and for Generations of Ohioans to Come*.

Dr. Julie Schaid, executive director, Ohio Partnership for Continued Learning, says three key recommendations for state leaders came out of the OGF report: create Ohio Innovation Zones and an incentive fund; focus on transforming the state's lowest performing schools; and develop a statewide education technology plan.

A major step forward resulted when Gov. Strickland incorporated about 70% of the OGF team's school reform recommendations in House Bill 1, which was heavily debated, reviewed and revised throughout spring and early summer 2009.

Espy singles out "the incredible involvement and support of The George Gund Foundation in Cleveland and The Cleveland Foundation for helping lead the project to success."

Results

Today, the results of OGF and its partners' work that helped inform the governor, the Ohio Department of Education (ODE) and the state legislature are as far-reaching as they are ground-breaking and ambitious, says Ohio Sen. Gary Cates, chair of the Senate Education Committee.

The philanthropic effort culminated in the successful passage of House Bill 1 by the House and Senate and when Gov. Strickland signed it into law July 17, 2009, mandating new, unprecedented educational reforms and funding policies designed to benefit all Ohio students.

According to Gov. Strickland and state ODE officials: Thanks, in part, to the proposals highlighted in OGF's *Education Initiative*, the state's new education reform and budget plan—included in the FY2010-2011 fiscal biennial budget—establishes a funding mechanism that utilizes research to determine what components are critical to determining student success within the Ohio evidenced-based model.

"The incredible energy, determination and dedication that (OGF and its foundations) brought to bear on this vitally important initiative is testament to their resolve to make things better for all Ohio citizens, especially our children. We are indebted to them for their important and noble work in strengthening education and providing hope for the future." —Governor Ted Strickland

Also, the new educational funding system will reduce over-reliance on local property taxes to fund Ohio's public schools. For example, House Bill 1 appropriations in FY 2010 represent a 5.78 percent increase over the previous year. Over the biennium, support for the state's schools will increase by 5.54 percent representing both state and federal stimulus funds. House Bill 1 also increases the level of transparency and accountability of school districts to produce results for Ohio's children.

According to Ohio School Superintendent Deborah Delisle, it also serves to modernize Ohio classrooms and curriculum; expands learning opportunities for students; strengthens the teaching profession; revises assessments to better measure Ohio students against the world; increases school district accountability and transparency; and establishes a constitutional funding system for education.

Additionally, House Bill 1 required Superintendent Delisle to provide a 10-year strategic plan to the Ohio General Assembly by Dec. 1, 2009, which she did. That report is now being reviewed by the legislature.

On the philanthropic front, not only did Ohio foundations repeatedly step forward to provide funding and expertise for the many studies, reports and convenings that helped lead to the successful effort in changing the state's educational system and policies, but according to OGF, the state's grantmakers invest more than \$300 million a year in programs and projects supporting childhood education through adult learning.

One major benefit to the OGF's Education Initiative success was the regional association being selected by the Bill and Melinda Gates Foundation to be their sole grantee in Ohio for its educational policy work.

"We'll sub-grant out the Gates' funding to other organizations for the educational work," says Espy. "About 80 percent of those dollars will be used for their own work, but 20 percent has to be used for joint projects. This will result in foundations having a stronger, unified voice in Ohio."

Response From Policymakers

The work of OGF, its foundation members and its many partners—and the countless hours and dollars expended to change Ohio’s educational system for the better—is bringing praise from the governor, the state super-intendent of public instruction, legislators, policymakers, Board of Education and educational think tank and pro-education organization leaders.

“The incredible energy, determination and dedication that (OGF and its foundation members) brought to bear on this vitally important initiative is testament to their resolve to make things better for all Ohio citizens, especially our children,” says Gov. Strickland. “We are indebted to them for their important and noble work in strengthening education and providing hope for the future.”

The magnitude of the ongoing educational changes and the scope of work still ahead are incredible challenges, but with the help of the OGF and its members “we will continue to move forward to effect positive and sustainable change for the betterment of all Ohioans,” says Jennifer L. Sheets, president of the Ohio Board of Education.

State Rep. Brian G. Williams, chair of the House Education Committee, says the recently passed education reform agenda “would not have been possible without the participation and leadership exhibited by OGF and the many foundations that rallied to the cause of an improved educational system.”

Senator Cates, chair of the Senate Education Committee, points out that OGF’s decision in launching its *Education Initiative* “has made it a key player at the table as Ohio looks to move forward.”

KEY LESSONS FOR SUCCESS

Espy says that “Success comes from understanding and finding strategic pathways to mutual goals.” For George Gund Foundation program officer Ann Mullin, key lessons learned from the initiative are “identifying an important societal need, formulating a strategic plan and sticking with it.”

- ➔ Clearly define goals, strategy and tactics for the initiative
- ➔ Engage members and key stakeholders through meetings, Webinars, etc.
- ➔ Align with local, regional, state and/or national partners who share goals
- ➔ Obtain, fund and disseminate the best research to inform the effort
- ➔ Build relationships with key decision-makers; understand their needs, goals
- ➔ Develop strategic communications plan for external/internal information dissemination

DISCUSSION QUESTIONS

- 1) How would our funding community go about identifying a single priority issue, as OGF did?
- 2) Could OGF’s approach be applied to other fields (e.g., health care, human services)?
- 3) How would working toward systems change in another field be the same or different as in education?

PolicyWorks for Philanthropy

Helping Regional Associations
Engage Policymakers

POLICYWORKS FOR PHILANTHROPY seeks to build the capacity of regional associations of grantmakers’ staff, board and volunteer leaders to engage policy makers in support of a vibrant and effective philanthropic sector. The 20 regional associations participating in PolicyWorks serve more than 3,000 foundations and corporate giving programs in 39 states. Policy work includes: government relations—related to legislation and regulations affecting the work of charitable foundations; and public policy engagement—supporting the achievement of charitable foundations’ grantmaking goals.

PolicyWorks is led by the Council of Michigan Foundations (fiscal agent), Donors Forum (Illinois), Grantmakers of Western Pennsylvania, Northern California Grantmakers, Ohio Grantmakers Forum and Philanthropy New York and funded by the William and Flora Hewlett Foundation and the Charles Stewart Mott Foundation. PolicyWorks partners include the Communications Network, Forum of Regional Associations of Grantmakers and the Philanthropy Awareness Initiative.