

Quality Education for All

Important Lessons for The Community Foundation

The Community Foundation's 10-year Quality Education for All initiative was intended to impact the community. But eight years into the work, it is clear that QEA has also had a major impact on the Foundation.

When The Community Foundation for Northeast Florida launched its 10-year Quality Education for All initiative in the fall of 2005, the intent was to effect long-term systemic change in public education in Duval County, Florida.

More than eight years into the initiative, it is clear that Quality Education for All also has effected long-term systemic change within The Community Foundation itself.

QEA has provided an opportunity for the Foundation to play a new, more expansive role, moving beyond that of "grantmaker" to that of "community change agent." In assuming this new role, the Foundation has had to confront new challenges, reckon with some difficult realities and develop new skills and resources.

This report looks at the changes that have taken place within The Community Foundation as the Quality Education for All initiative has unfolded in the last eight years. A separate report (*Quality Education for All: Changing the Landscape for Duval County Public Education*) looks at the way in which the initiative has impacted public education in Duval County.

The Right Point in Time

Organizations, like individuals, generally grow when they are ready to grow. The past is prologue -- a truism that certainly applies to The Community Foundation.

Prior to 2005, the Foundation's experience in leading philanthropic initiatives was limited, in large part because of the organization's limited capacity. Founded in 1964, The Community Foundation spent its first two decades getting established and raising endowment. It wasn't until the 1980s that the Foundation employed professional philanthropic staff and launched its first philanthropic initiatives, around the arts, race relations and community development. While these initiatives, in various ways, were about community change, the Foundation's capacity to drive that change was limited. Available funds were short -- the Foundation's assets did not reach \$50 million until the end of the 1990s and very few dollars were available for discretionary grantmaking. And the staff and trustees had limited knowledge of and experience in the type of long-term, strategic commitments needed to drive community change.

By the early 2000s, the Foundation found itself in a different place. Changes in its legal underpinnings allowed more robust investment growth. Changes to the business model began to grow dollars available for discretionary grantmaking. An evolving professional staff expanded their understanding of strategic philanthropic practices. These changes helped energize the board of trustees, members became more engaged and, together with staff, they began to appreciate the Foundation's potential.

As the Foundation approached its 40th anniversary in 2004, staff and trustees engaged in a period of reflection, looking back on past work and thinking about the needs that existed in the community at the time. Through a deliberate series of community conversations, surveys and focus groups, the Foundation's trustees identified a range of critical issues facing the greater Jacksonville community. They ultimately identified quality education as the issue around which The Community Foundation was most interested in leveraging change.

The reasons were many:

Quality public education connects to a high quality of life in multiple ways. The public education system not only helps prepare young people for productive adult lives, it is instrumental in growing a robust and capable workforce that attracts potential employers – thus it is an important ingredient in the community's future economic growth. A focus on quality education, therefore, enabled the Foundation to connect with a broad array of community stakeholders with varying core interests.

Public education in Duval County has a troubled history. Public schools were officially discredited in the 1960s and operated under court-ordered desegregation until the mid 1980s. Like many communities in the South, Jacksonville's public education system was seen by many as racially inequitable, meaning efforts to improve quality education would require attention to issues of race and equity, fields in which the Foundation had historically had an interest.

There were opportunities to lead. Duval County Public School students' academic performance was below par – among the lowest in Florida. While there were scores of businesses and community-based organizations attempting to support and help the school system, their efforts were disjointed. The community's local education

fund was not focused on community leadership or on stimulating change in the classroom. There was a clear lack of coordinated community leadership around the issue.

After careful research and consideration, the trustees in 2005 agreed to commit \$200,000 a year for 10 years to Quality Education for *All*, an initiative to improve the academic performance of Duval County public school students. Both the size and duration of the commitment represented bold steps for the Foundation. More importantly, it was the first time the Foundation had the staff capacity, the financial resources and the trustee commitment needed to exercise strong leadership around a community issue.

Nonetheless, the experiences of the past had not fully prepared the Foundation for the new role it must play. Though the Foundation had experience as a check-writer, connector and convener, it had not been intentional about using these tools to lead on a particular issue. Though it had partnered with others on many projects, it did not understand the challenges of moving from cooperation to collaboration to co-creation. And though it had been part of public dialogue on a number of controversial issues, it had very little political savvy.

Consequently, Quality Education for *All* has proven to be a rigorous, hands-on learning experience for Foundation staff and trustees. The lessons it has taught The Community Foundation will be a major part of QEA's legacy.

LESSON #1

Leading Community Change Means Doing More Than Making Grants

The trustees and staff who launched Quality Education for *All* in 2005 recognized that they needed more than just grant dollars in their arsenal to effect real change. That awareness was reflected in the Foundation's approach.

QEA was structured around three strands of work -- **Community Learning, Direct Investment** and **Advocacy**. In each strand, the Foundation took an active role, investing both dollars and significant staff time. Staff convened community leaders, developing and leading the learning agenda; staff brought in experts and worked with school leaders to develop innovative programs, and then funded pilots of those programs; and staff initiated and underwrote research, commissioned polls and participated in and encouraged others to participate in the political process.

While the trustees intuitively understood that change required more than money, they had no formalized way to define or discuss the non-financial forms of capital that they would need to deploy. Having such a lexicon proved to be important, as trustees, staff and community and foundation stakeholders needed to reframe their understanding of and expectations for the Foundation's work.

Through work with various consultants, the trustees gradually learned to identify five different forms of capital that can be deployed by foundations:

- Social capital (ability to build networks of people),
- Moral capital (credibility and political independence),
- Intellectual capital (knowledge, data and expertise),
- Reputational capital (the ability to influence)
- And, of course, financial capital.

As Quality Education for *All* unfolded, experience revealed the value of the non-financial forms of capital. The ability to build networks, coupled with knowledge and data, was critical to infusing community leaders with a more sophisticated understanding of the challenges facing public education, and contributed to success in building the Learning to Finish Collaborative, a multi-organization drop-out prevention initiative. It was reputational capital that enabled the Foundation to attract partners

such as the Pew Partnership for Civic Change, the Charles Stewart Mott Foundation and the Youth Transition Funders Group. And the political independence that comes with moral capital enabled the Foundation to successfully navigate turbulent transitions in public school administration. It also helped the Foundation navigate a politically difficult transformation of the local education fund that resulted in creation of the Jacksonville Public Education Fund, and support creation of the Save Duval Schools advocacy organization.

While these investments did not always involve traditional grant dollars, they did carry costs for the Foundation. A 2010 cost study showed that in its most intensive phase, the QEA initiative required two full-time staff plus considerable time and attention from the Foundation's president. (Over time, the Foundation determined that an allocation of one to 1.5 staff allowed it to provide an appropriate and manageable level of leadership.)

In recent years, the lessons of multiple forms of capital have carried over to other work that the Foundation has undertaken.

When asked to manage a \$5 million grantmaking fund to benefit veterans of the Afghanistan and Iraq wars, for example, Foundation staff and trustees drew on their QEA experiences with networking and building knowledge. Their first move was to network within the North Florida military and military-support community and build an advisory group that could, as a group, gain the knowledge and information needed to effectively deploy the philanthropic dollars.

Moreover, as the Foundation embarked upon strategic planning in 2011, the multiple forms of capital provided an important lens through which to view the work of the Foundation, helping trustees understand and appreciate the more subtle and sometimes hard-to-see ways in which the Foundation adds value to the community, as well as informing strategies for future actions.

IN SUM - Foundations undertaking community leadership work should be clear about the multiple forms of capital at their disposal and the diverse ways they can deploy that capital to influence decision makers, introduce innovation and inspire and support change.

LESSON #2

Be Clear About the Ways You Add Value (Infrastructure, Infrastructure, Infrastructure)

As the Quality Education for All Initiative unfolded, The Community Foundation staff commissioned a large-scale body of research tracking four cohorts of public school students from 9th to 12th grade. Staff brought in experts and hosted training sessions for school principals and administrators. With those experts, Foundation staff helped design a summer bridge program that was instituted in a handful of middle schools. Staff also developed a pilot high school program to target and support at-risk students. And staff led the coordination of organizations that became the Learning to Finish Collaborative. To accomplish these and many other tasks, the Foundation added staff who devoted the majority, if not all, of their time to Quality Education for All.

Three years into the initiative, Foundation President Nina Waters confronted the fact that The Community Foundation was both funding QEA and operating several of the programs QEA advanced.

The Foundation did not set out to operate programs. As the work evolved, the Foundation realized that there were not community partners capable of and positioned to take on the work. But by operating programs, the Foundation strayed into work that detracted from its ability to focus on its broader mission.

In 2008, the Foundation took deliberate steps to grow the necessary community infrastructure.

Foundation staff and trustees led an effort to overhaul the community's local education fund, transforming it into a high-capacity fund, with professional staff and stable multi-year funding, that could assume responsibility for research and public engagement. Staff worked to strengthen the Learning to Finish Collaborative so that other community partners could play leadership roles in programmatic work around reducing the dropout rate. Staff also supported the launch of Save Duval Schools, a 501(c)(4) advocacy organization focused on state-level issues.

"Our role is that of funder, convener, change agent -- not program operator," said Foundation President Nina Waters. "We have learned to ask ourselves, 'WHO is going to do this work?' Building infrastructure may not be the sexiest thing a foundation can do, but it may be the smartest."

In recent years, the Foundation has applied this lesson to its work with senior-serving organizations, helping them build the infrastructure to improve their collective service to the community. And the lesson is informing a new initiative exploring ways the Foundation can impact the Gay and Lesbian community in Northeast Florida.

IN SUM - Just as there are diverse types of capital, there are diverse ways to invest - opportunities for programmatic investments as well as infrastructure investments. Foundations should think carefully about the roles for which they are best suited, and the roles that are more appropriate for others.

LESSON #3

Community Change Work Requires Unique Knowledge and Unique Skill Sets

Almost inevitably, community change work will require engagement in the political process -- at the local, state or even federal level. And just as frequently, community change work will require efforts to build public will to support that change. In either endeavor, staff efforts will benefit from expertise in politics, community organizing and advocacy, as well as state budgets and the interaction of state and local funding streams.

The Quality Education for *All* initiative encountered political challenges on multiple occasions as it wrestled with the task of engaging members of an elected school board as advocates for changing school system practices for the benefit of students.

Staff and trustees dealt with the political realities that come along with very public leadership on a difficult issue -- among them the fact that many people, including the Foundation's donors and constituents, may disagree about the best solutions.

The Foundation, which is focused on a five-county region in Northeast Florida, also confronted the fact that state policies affect local educational outcomes. It took steps to extend its reach to impact those policies, first by funding Save Duval Schools to advocate before the state Legislature, and second by joining forces with other funders through the Florida Philanthropic Network's Education Affinity Group.

Staff had to be mindful of the boundaries between lobbying and advocacy as they mapped the work of the Foundation and ultimately drafted a policy to guide them in this arena. Similarly, they had to be cognizant of the appropriate way to interact with Save Duval Schools, which was a 501(c)(4) with greater latitude to advocate on behalf of the public school system.

IN SUM - Expertise in politics, community organizing and advocacy may or may not be in the portfolio of foundation staff and trustees, but it will be required. Foundations must be honest with themselves about the skills they have, and at what level, and the skills they lack, and find ways to become more adept at the subtleties of power and influence.

LESSON #4

Building Healthy Partnerships Is Critical But Sometimes Challenging

Community change, without question, requires partnerships and, for foundations, these partnerships may take different forms. Foundations typically will need to partner with their grantees and with major community institutions that they seek to influence (in the case of QEA, the Duval County Public Schools administration and School Board). These one-on-one partnerships come with their own unique set of challenges -- understanding the needs of the partners, finding common ground, developing clear communications and expectations among them -- but they are challenges that are probably more familiar to foundations.

In the work of QEA, The Community Foundation also experienced a different type of partnership challenge - - the challenge of facilitating partnerships among misaligned actors in the public education field. Through convening, coordinating and supporting, the Foundation played an instrumental role in bringing together organizations with common interests in improving public education, but with differing views, stakeholders and ownership needs. This latter work was particularly challenging.

No one institution or organization is likely to succeed at driving sustainable community change on critical issues. Yet organizations often compete with one another for supporters and volunteers, money and recognition. Different leaders see issues through

different lenses and may not agree on strategies. It is hard to develop the trust, the alignment of work and the common commitment needed for community change work.

Moreover, funders often add to the challenge, albeit inadvertently, by encouraging organizations to innovate, distinguish their work and evaluate the impact of their work.

The Learning to Finish Collaborative, which was born out of QEA and initially staffed by the Foundation, has proven an ideal learning platform for the Foundation (and others) on the benefits and challenges of these multi-lateral partnerships. The LTF Collaborative includes five lead organizations -- The Community Foundation, Duval County Public Schools, Jacksonville Children's Commission, Jacksonville Public Education Fund and United Way of Northeast Florida -- and a host of other partners joined in efforts to reduce the number of students who do not finish high school on time.

In April 2011, members of the collaborative and other key stakeholders came together and shared the lessons learned from their experience. Among the notable points:

- The difficulties of building and implementing a true collaboration are underestimated.
- In true collaborations, each member holds equity. Funding is shared, control is shared, accountability is shared. To achieve that, a lead funder may have to step back and relinquish some power -- a difficult act for a lead investor.
- Healthy partnerships create safe space -- for thinking, for testing ideas, for sharing concerns. All partners must respect the sanctity of this space.

Through the LTF Collaborative, QEA has confronted the essential challenge of these partnerships: our natural tendency to say "**We** have an idea/resources/strategy; come join **us** and be **our** partner." Instead, the challenge must be at the center

of the conversation, with each potential partner bringing his or her ideas/resources/strategies to the table. The process of sorting may be messier and take more time, but the end result will be a stronger, more equitable partnership, more likely to survive rough going ahead.

IN SUM - Partnerships that build community alliances require everyone --- funders included -- to check their egos at the door, to put the issue, not "our solution," at the center of the conversation, and to share ownership. Only when each party shares leadership and control can the power of the partnership emerge.

LESSON #5

Community Change Takes Time... And Often That's A Good Thing

"Community change takes time" -- It is a truth that is easy to say and harder to live with. Boards of directors want to see results -- before their terms expire. Investors can be impatient. And the public expects immediate results and easily loses sight of long-term goals.

For Foundation staff and trustees, QEA has presented the constant challenge of maintaining the long view while wrestling with the crises of the day. Those crises might be political or financial, or they might be philosophical -- finding ways to coexist constructively with those who want to work on short-term solutions.

But QEA also has taught the Foundation staff and trustees the benefits of time.

Foundation trustees established QEA as a 10-year initiative. The trustees were not naive enough to think that public education could be completely reformed in 10 years. Rather, the 10-year frame was the Foundation's way of saying, "This is long-term work, this will take time and we will stay the course." That was a decidedly different approach for a funder of the Foundation's size, and it gave the Foundation some distinct points of leverage. The 10-year time frame:

- Helped to build community trust. There was no question about the Foundation's commitment to the issue. Moreover, a 10-year commitment suggested the gravity of the situation, which helped push some donors and stakeholders from the sidelines onto the playing field.
- Positioned QEA and the Foundation as a serious presence for the school administration. This was not some do-gooder idea that could be politely ignored. This was a presence that would outlast superintendents

and school board members, and must be reckoned with.

- Gave the Foundation and QEA participants time to learn. Without question, the perceptions and attitudes that prevailed in the fall of 2005 when the first QEA program was launched have undergone major overhauls. Data, exposure to new ideas and experience have changed, and continue to change, conventional wisdom about public education.
- Gave the Foundation time to invest in infrastructure (See Lesson #2).
- Gave the Foundation and QEA stakeholders time to make course corrections. Just as learning changes perceptions, it can change strategies. Time allows for constructive failure and subsequent adjustments.

IN SUM -- Time has its advantages. Foundations should avoid the pressures of today and maintain the long view, recognizing that time and tenacity impart unique strengths to the work.

LESSON #6

Community Change Work Can Stimulate Philanthropic Investment

The Community Foundation's mission is "Stimulating Philanthropy to Build a Better Community." Quality Education for *All* clearly belonged to the "Build a Better Community" side of that mission statement.

But in fact, Quality Education for *All* has stimulated significant philanthropic investment in greater Jacksonville around issues of public education.

Within months of launching the initiative, the community raised \$5 million to support establishment of a Teach For America program in Duval County. Two family foundations have invested more than \$1 million directly in Duval County Public Schools and millions

more in community infrastructure to support public education reform.

All told, private philanthropy has raised more than \$25 million in support of public education reform since 2005 -- in addition to the \$2.6 million invested by The Community Foundation. In April 2013, The Community Foundation, in conjunction with other philanthropic partners, announced the establishment of the Quality Education for All Fund, a \$50 million investment in building a pipeline of high quality teachers and educational leaders to improve public schools in Duval County.

By launching a bold initiative, with significant dollars and substantial time devoted to it, The Community Foundation attracted attention to the challenge of public education reform. In addition to attracting attention, the initiative shed light on realistic strategies for change -- strategies that had been successful elsewhere, that were supported by data, that were achievable for the community. This, in turn, excited donors and gave them comfort about the wisdom of investing private dollars -- good news for the community and for the Foundation.

This infusion of private funding has helped to attract outside dollars, making the school system more competitive in the hunt for federal and national foundation grants.

Additionally, it has influenced how local public dollars are spent. The school system has chosen to invest in programs and initiatives targeted by QEA and its sister efforts -- even in tough budget years.

While not all of the dollars raised have ended up within The Community Foundation, the positive philanthropic effect has added credibility to the Foundation, both as a philanthropic force and a community change agent.

Many community foundations fear that sticking their neck out on a tough community issue will alienate donors and jeopardize relationships. That has not

been the case with the Foundation, whose assets have more than quadrupled since 2004.

IN SUM -- Change inspires giving. As community-minded donors see change happen, they want to become involved. While they may take a parallel track, or sometimes even a divergent track, the benefits of citizen engagement and investment can be significant.

CONCLUSION

As Community Foundation trustees and staff have engaged in strategic planning for the next several years, the question has arisen: is community change agent the preferred role for this community foundation? The consensus has been this: while not everything The Community Foundation does is about community change, community change is, in fact, an integral part of the Foundation's identity.

There are many arenas in which the Foundation's preferred role will be that of traditional grantmaker. And there are other arenas where the Foundation may play only the role of convener, or serve merely as a connector between entities. These all are valid and appropriate ways for the Foundation to add value in the community.

But in certain circumstances, around certain issues, the most appropriate and beneficial role for the Foundation is that of community change agent. Knowing and understanding the skills and tools needed to play that role, and developing that expertise, positions the Foundation to be a more rich and robust resource for the community for years to come.

Ten years ago, trustees might have been more quick to say the Foundation was about helping individual donors achieve their goals. That remains true. But through Quality Education for *All*, the staff and trustees have seen another level of opportunity for the Foundation -- one that Stimulates Philanthropy, Builds a Better Community, and grows a smarter foundation.