



EDUCATION FUNDERS NETWORK

Does co-funding make sense for
Iowa education grantmakers?

Report
December 2013

INTRODUCTION

How can funders come together around an issue? What are the barriers? What operational support do they need? What are the best topics to address? And if funders do work together, what is the potential for the charitable sector be strengthened?

These are some of the questions explored by members of the Iowa Council of Foundations (ICoF) Education Funders Network throughout most of 2013 as they tested the feasibility and practicality of embarking on a co-funding project.

While the concept of co-funding is not new within the grantmaking community, this project was significant because for the first time, Iowa grantmakers came together to examine their practices and to look beyond their individual interests to consider how they might align their work to achieve shared goals. This report documents the experiences, successes, and lessons learned during their co-funding investigation as of the end of 2013. As you'll learn, this project has strengthened relationships among Iowa funders, enhanced the participants' understanding of education issues in Iowa, and is helping to expand the reach and presence of a national funder in our state.

We are very proud of the results of this project so far, and are pleased to share them with you! We hope this document will serve as a guide, resource, and inspiration to other funders interested in amplifying the impact of their giving through a partnership with other grantmakers.

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ACKNOWLEDGMENTS

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SUGGESTIONS FOR USE

This guide outlines the process used, and lessons learned, by the Iowa Council of Foundation Education Funders Network in its project to examine if co-funding makes sense for Iowa education grantmakers. It is intended to provide guidance to other funders, regional associations of grantmakers, and other stakeholders interested in the idea of a co-funding structure.

With that in mind, here are some suggested uses for this guide.

- Incorporate some of the project's guiding principles when outlining your co-funding project.
- Adapt the tools, such as the issue matrix, to help focus on an issue area.
- Use a survey to gather funder feedback about your project's process and outcomes.



ABOUT THE CAMPAIGN FOR GRADE-LEVEL READING

The Campaign for Grade-Level Reading is a program of the Annie E. Casey Foundation that works with foundations, nonprofits, and public entities to ensure that children in low-income families develop reading proficiency. The Campaign focuses on grade-level reading by the end of third grade because this is the time when a child must shift from learning to read to

reading to learn in order to master the more complex subjects introduced in the fourth grade curriculum. Research has shown that grade-level reading by the end of third grade is a powerful predictor of success in school and high school graduation. For more information, visit www.gradelevelreading.net.

BACKGROUND

The Iowa Council of Foundations (ICoF)

The Iowa Council of Foundations is a nonprofit, membership based organization serving grantmakers that provide funding support to charitable projects and programs in Iowa. Its membership is comprised of community, private, family, and corporate foundations, as well as corporate giving programs. The Iowa Council of Foundations works to strengthen and promote philanthropy in the state, facilitate and promote effective philanthropic grantmaking, and to provide a forum for members to discuss programs and issues. The organization provides opportunities for grantmakers to access information, to build skills through professional development, and to network with one another to share information about programs and priorities.

The Iowa Education Funders Network

The Iowa Education Funders Network is a learning circle, with approximately ten active members, within the Iowa Council of Foundations membership. This group of seasoned grantmakers represents a variety of foundation types and assets, including private, corporate, and community foundations – all who are committed to making world-class learning a reality for every Iowa student. The Network provides connections and resources to grantmakers that fund within the area of education by presenting information on promising tactics and trends and helping members develop personal and institutional connections. The Network provides a forum for shared action, and helps other state leaders understand the impact and ensure that representatives of the philanthropic sector are at the

table during critical discussions about education in Iowa. While specific educational interests and strategies vary among its members, the Network understands the role of philanthropy in educational change can be catalytic: helping large systems to take risks and to change. Together, Network members represent nearly \$1 billion in assets and invest over \$41 million in grants annually.

The Network has been functioning since the summer of 2011. As it explored critical education issues in the state, members recognized that these may be too large and complex for any one grantmaker to effectively address alone. In 2013, Network members began to explore the concept of co-funding as a means to expand the impact of their grants and to leverage additional resources.

Education Funders Network Members

The Community Foundation
of Greater Dubuque

The Greater Cedar Rapids
Community Foundation

The Community Foundation
of the Great River Bend

Greater Poweshiek Community
Foundation

Alliant Energy Foundation

Rockwell Collins Charitable
Foundation

R.J. McElroy Trust

Iowa West Foundation

Martha-Ellen Tye Foundation

Monica Fischer

Grinnell College Office of Community
Enhancement and Engagement

Pioneer Hi-Bred International

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THE CONTEXT

Many challenges in education are too complex to be addressed by any one funder. One of the leaders of the Network says that funding education in an era of a national policy change, pockets of disruptive innovation, and budget crises, can feel like “driving in a blizzard! You don’t know if you should pull over and wait for it to stop, follow the snow plow of mega-foundations, or just trust your gut instinct and move forward.”

The role of philanthropy in educational change can be catalytic: helping large systems to take risks and to change. This is needed, even in a state like Iowa, traditionally a leader in education. Over the last few decades, Iowa’s educational strategy has been to continue what has worked in the past. Achievement of Iowa’s students has been surpassed by students in other states and countries where more innovation has occurred. Because of the drop in the State’s education rankings, there is urgency for change. This is an important time for philanthropy to act effectively.

Iowa Education Funders Network Co-funding Project Grantmakers who are part of the Iowa Education Funders Network felt that together, they could learn how to make better grant investments for the children of Iowa and set

out to determine if funding together could exponentially increase impact.

In Spring 2013, the Iowa Education Funders Network clarified its interest in exploring co-funding and outlined a ‘learning-by-doing process’ to investigate the opportunities/challenges of co-funding among Iowa funders within the context of developing a proposal and seeking funding from a national organization. With support from an anonymous donor, the Network developed and circulated an RFP and selected Regenia Bailey, Bailey Leadership Initiative, LLC to serve as the consultant to facilitate a nine-month investigation process. Specifically, the project was designed to address the following questions.

Learning Questions to be Answered During Our Investigation:

- | | | | |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | (How) would co-funding amplify the voice of the philanthropic sector in Iowa? | 5 | What are the barriers inherent in co-funding? What are the likely problems that will be encountered? |
| 2 | What operational capacity is required by the “hub” (presumably ICoF) to facilitate co-funding? <ul style="list-style-type: none">• Is this capacity available? | 6 | What are common concerns for funders (i.e. differences in mission)? |
| 3 | What operational capacity is required by each grantmaker that is involved? <ul style="list-style-type: none">• Is this capacity available? | 7 | Would co-funding build or threaten relationships among funders? What would have to be present in the system to ensure positive relationships are developed? |
| 4 | Would co-funding generate more resources-for-good in Iowa? <ul style="list-style-type: none">• Would co-funding generate more resources for Iowa Community Foundations? | 8 | How are local vision, goals, and needs accommodated or enhanced by working together? |

Doing Questions to be Answered During Our Investigation:

- | | | | |
|----------|-----------------------------------------------------------------------------------------------------------|----------|--------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Is the co-funding structure that is most optimal for Iowa funders likely to be funded by outside funders? | 3 | (When) does it make sense for locally-focused grantmakers to think of the state more broadly? Where’s the limit? |
| 2 | Is it worth the effort to apply for outside funding? | 4 | What are the best topics to address together? STEM education, Early Childhood Education, K-3 reading, high school scholarships? Why? |

What Do We Mean by Co-funding?

While there is no one-size fits all approach to co-funding in philanthropy, Grantmakers for Effective Organizations (GEO) have developed a typology of co-funding:

- **Pooled funding (aka capital aggregation)** - Funders contribute to a collective fund, which may be jointly administered by the group or by a lead donor or third party.
- **Targeted co-funding** - Funders deliberately but independently make a grant to the same program, organization or issue.
- **Strategic alignment** - Funders or partners agree to adopt joint or complementary strategies, in pursuit of a common goal.

Through its investigation, the Education Funders Network explored each of these types of co-funding.

PROJECT PHASES

1 Discovery Phase

The project began with a 'Discovery Phase' in which the consultant reviewed co-funding literature and case studies. **(For a list of resources, see Appendix A.)**

She then conducted phone and in-person interviews with Network members about:

- Their organizations' activities in education;
- The education needs, trends, and successes that they were seeing in their experiences with grantees and;
- Their organizations' interests and concerns about a co-funding structure to address education issues.

(See Appendix B for a list of interview questions.)

Consistently, funders expressed concerns about the ability to "connect the dots" of a co-funded project to the specific funding interests or geographic service areas of their organizations. Generally, the funders indicated if they could make the connection between a co-funded project and their organizations' funding guidelines and interests, it would increase the likelihood of participation in the project. At this point, some Network members realized it was not likely their organization would participate and elected to step out of the project.

2 Exploration Phase

Participants met in June, July, September, October, and November to learn more about each other's work in education, develop a deeper understanding of co-funding models, and examine current education issues in Iowa that might benefit from a co-funding approach.

The first meeting in June was a telephone meeting to discuss co-funding models. Participants were presented with an overview of co-funding models and provided a summary of the information gathered in the funder interviews. To help best refine the appropriate co-funding model, participants decided the group's next step would be an examination of various education topics to select a focus area for the project.

3 Selecting a Focus Area

The July and September meetings used a matrix of criteria to evaluate various education focus areas to determine their fit for this project. **(See Issues Matrix in Appendix C.)** Participants discussed focus areas such as STEM, early childhood education, higher education attainment, grade-level reading, and high school graduation. The discussions not only provided participants an opportunity to weigh the issues against a list of criteria, but also provided the opportunity for them to discuss how they were addressing various education issues through existing grantee programs and other initiatives within their own organizations.

At the September meeting, the Network identified grade-level reading as its focus area for collaborative work. Network members asked the consultant to research and compile information about additional programs in the state that were working to address this issue. **(See Appendix D for map.)**

In early October, the consultant conducted interviews with:

- The Iowa representative from the Annie E. Casey Foundation to learn more about the Campaign for Grade-Level Reading. To date, the Campaign has a presence in six Iowa communities/areas (Dubuque, Marshalltown, Ames, Des Moines, Council Bluffs, and the Quad Cities).
- Staff from the Iowa Child and Family Policy Center, a nonprofit research and advocacy organization promoting outcome-based policies that improve child well-being.
- Organizers of the Iowa Reading Corps, a program sponsored by the United Ways of Iowa, in collaboration with the Iowa Commission on Volunteer Service. The Iowa Reading Corps is a franchise program of Minnesota Reading Corps, an evidence-based program model launched ten years ago in Minnesota that works within schools to provide literacy tutors for children aged three to grade three.

Steps Toward Mobilization

In late October, the Network convened again, this time with the Iowa representative from the Annie E. Casey Foundation's Campaign for Grade-Level Reading. The purpose of this meeting was for Network members to learn more about how the program works within local communities and future plans for the Campaign in Iowa. At this meeting, participants clarified their intent to use the Campaign for Grade-Level Reading as their focal issue and began to discuss possible funding models and approaches for their work together.

In November, participants discussed the three community solution areas that the Campaign for Grade-Level Reading has identified to ensure that children in low-income families develop reading proficiency:

- School readiness;
- School attendance and;
- Addressing summer learning loss

At this meeting, Network members agreed to focus on summer programming to address summer learning loss. Most importantly, they agreed to strategically align the work of their respective organizations in this area to help improve grade-level reading in Iowa.

To outline the structure of what will constitute the strategic alignment of their work, Network members developed a Memorandum of Understanding (MOU) **(See Appendix E)**. The MOU serves to:

- Define the types of data that the participating organizations will track.
- Provide Network members with a clear description of the project to share with their respective board of directors and other leaders within their organizations.
- Provide Network members with a means to opt-in or opt-out of the project.

Looking Ahead

The grant that supported the co-funding project for 2013 ended on December 31, 2013. However, the work of the participant's has really only just begun! As of the date of this publication, Network members are sharing the MOU within their respective organizations and are poised to continue their collective efforts over the next several months.

The Network's interest in the Campaign for Grade-Level Reading is fully supported by the Annie E. Casey Foundation leadership **(see Appendix G)**. Further, it is anticipated that the Network's interest will help to expand the reach and presence of this national funder in Iowa; over the next several months it is expected that the Campaign's State Lead will begin to focus her efforts exclusively on Iowa. While the specifics of the partnership between Network members, the ICoF, and the Campaign is still being determined, it is clear that this project has – and will continue to – amplify the voice of the philanthropic sector in Iowa.

THE EXPERIENCES OF FUNDERS IN THE CO-FUNDING PROCESS

In December, participants in this project completed a survey (**Appendix F**) to reflect upon the project at the end of the grant period and outline their expectations for the project's next steps:

- Eleven members of the Ed Funders Network completed the survey.
- Ten of the respondents had participated in at least one of the project meetings.
- One member had chosen early in the project not to participate in the process due to the low likelihood of the organization participating in a co-funding project.

Stronger Relationships and Knowledge

One of the goals of this project was to strengthen relationships among participants and increase understanding about the work of the organizations represented in the project.

All participants confirmed that working on this project has strengthened relationships with their colleagues. All participants also indicated that the project increased their understanding of education issues in Iowa.

These are significant outcomes for the co-funding project.

Ripple Effect May Be Limited

Responses were more varied when participants were asked whether they would apply what they'd learned from the project to their organization's approach to education. Half of participants indicated that they were unsure that they would do so. One respondent indicated he would likely not suggest changes and four indicated that they would, two indicating a strong likelihood to do so. Of the funders who agreed that they would suggest changes to their organization's approach, two represent organizations that provide grants throughout the state, one is from an organization that is already actively involved with the Campaign for Grade-Level Reading, and one is from a private foundation.

Stronger – and Better Connected – Together

According to the survey results, nine of the ten members of the group felt that working together on the Campaign for Grade-Level Reading will amplify the voice of philanthropy on education issues in Iowa. One participant stated that the common goal could lead to shared metrics and the ability to tell a more powerful story about the issue. Another cited the Endow Iowa Tax Credit Program* as a collective approach toward

a common philanthropic goal already present in Iowa and that uniting around a single issue could leverage the impact within the individual communities to have a broader impact on that issue within the state. Other participants mentioned the importance of the connections the project fostered between Network members and national funders in education and policymakers in the state.

9 out of 10 participants said that working together will amplify the voice of philanthropy on education issues in Iowa as a result of this program.

*The Endow Iowa Tax Credit Program is a legislated program which provides tax credits for qualified donations to permanently endowed fund at a qualified community foundation or affiliate community foundation. The goal of the program is to promote philanthropic giving in Iowa.

More Resources Still on the Horizon?

To most participants, it was unclear if working together on the Campaign for Grade-Level reading would be likely to generate more philanthropic resources for the state. For those who believed the project would generate more resources, they primarily cited the opportunity that the project provides for local and state donors. Only one person mentioned the possibility of funding from outside funders.

Moving Ahead Requires Leadership

The developmental phase of the co-funding project concluded at the end of 2013, raising the question of what would be necessary for the Network to continue to move forward on the co-funding project. Participants indicated that their two highest priorities are to “keep the group moving toward strategic outcomes” and “call and organize regular meetings.” Providing timely and pertinent resources was also mentioned. All the funders involved with this project reported being willing to continue meeting during the next six months to continue work on this project.

Next Step: Share Data

The majority of the Network members are also willing to share data about the summer programs that they currently fund.

- One funder is willing to track and share outcomes data, as defined in the MOU.
- One participant reported being willing to take the lead on the shared Ed Funders work.
- Two funders are willing to do work locally as well as increase their organization’s investment in programs to address summer learning loss.
- One would like to increase local activity campaign for grade-level reading.
- One intends to increase organizational investments in summer learning loss.

Challenges are Persistent

In the initial one-on-one interviews conducted at the beginning of the project, funders said one of the barriers inherent in co-funding is making the connection from the larger project to their own organizations. Many organizations are place-based; as such, their funding is geographically restricted. Additionally, the issue focus of an organization may further constrain its involvement in a collaborative project. One Network member confirmed that the low likelihood of his organization participating in a co-funding project was the reason that he did not attend meetings or weigh-in on discussions – a factor that may have also kept others from participating in the investigation process.

GROUP ACCELERATORS: RELATIONSHIPS, A BIG-TENT ISSUE, AND COORDINATION

Several factors helped the group come to consensus in a relatively short time frame. By choosing summer learning loss within the context of the Campaign for Grade-Level Reading, the group tried to accommodate the local goals and needs of the participating organizations. Summer programs for youth seem to be a perennial favorite for place-based funders; most of the participants indicated that they had some involvement in funding summer programs. Additionally, the credibility of the Campaign for Grade-Level Reading, the fact that it already has a presence and a track-record in the state, and its place-based approach to working with communities increases the likelihood of alignment with the goals and needs of the participating organizations.

When asked about factors that helped accelerate the group's progress in co-funding, participants mentioned the presence of a facilitator to keep the process moving, characteristics of the participants, and trust among the participants as the key factors. The participants' knowledge, their geographic diversity, and their influence and connections were some of the characteristics that contributed to the group's progress. Trust, openness, and positive relationships among participants also helped accelerate the process. A few participants mentioned the issue itself as something that helped move the group along.

Inhibiting Factors

When asked about the factors that held the group back in implementing co-funding, participants most frequently mentioned the difference in funding priorities among their various organizations. Other inhibiting factors that were mentioned related more to the structural concerns about the project: the challenge of getting people together; the lack of urgency, and the polite quality of relationships among funders (“Iowa nice”) that may have limited difficult conversations about co-funding issues.

Sticking With It

Participants have shared broad information with their organizations about this project. Most have described it as an exploratory project, and have not yet provided details to their board of directors/leadership within their organizations. Some participants said they are waiting for the final report before providing information to their organizations.

Looking forward to the first six months of 2014, participants said they anticipate gaining more knowledge about the issue; developing a greater understanding of the local, as well as the broader, impact of working together on this issue, and to continuing to develop strong relationship with other funders.

All ten participants noted ‘high’ or ‘moderate’ commitment to the project moving forward. Again, this is a significant outcome for the project.

CHALLENGES, LESSONS, SUCCESSES, NEXT STEPS

Challenges

We are proud to say that the group has made substantial progress in nine months. The group has built relationships, established a working framework, vetted opportunities, chosen an issue and agreed to a strategic alignment approach.

However, the best laid plans often begin with an ambitious timetable! This was the case with the co-funding project. The ICoF Education Funders Network anticipated that this project would be further along at its conclusion than it is at this time.

At the November meeting, participants requested that the facilitator provide a draft of a Memorandum of Understanding (MOU) to review and share within their organizations. It is anticipated the MOU will be finalized in early 2014.

Lesson: Collaborative projects take time; this was widely understood at the onset of the project. In order to move forward on a project, participants must know one another and have good working relationships. This often requires that groups hold in-person meetings, especially early on in the project, which increases the participants' time commitment. The ability to pull busy people together was noted as an inhibiting factor in the group's progress on this project.

Lesson: Collaborative projects require progressive opportunities for organizations to officially commit (or opt-out).

Challenge: To date, the participants have not been required to opt-in or opt-out of the co-funding project and were allowed to participate in the discussions, even when they were unsure if they would ultimately commit. This became a "chicken-and-egg" dilemma. The project emerged with a "big tent" flavor to accommodate the interest of all participants. A smaller group may have selected a more narrowly focused or more provocative issue.

The MOU that was developed after the November meeting is a step to encourage commitment by the member organizations. It is noteworthy that the best-attended meeting was one that was scheduled to determine the group's focus issue. However, the November meeting, which was scheduled to determine the co-funding structure for the group, was the most poorly attended. It may have been a scheduling coincidence, or it could speak to the larger challenge of commitment.

Lesson: It may be helpful to determine deadlines for the project as it moves forward to help create a sense of urgency to propel the group.

Opportunities, like signing the forthcoming MOU or submitting a proposal to an outside funder, can help create urgency and commitment to fuel the momentum of the project.

Challenge: In the survey, one participant mentioned the lack of urgency or pressure as a factor that inhibited the speed of the project's development. One goal of the project was to develop a proposal for funding from a national organization. This goal became secondary to identifying an issue to work on together, so the only real deadline was the 9-month term of the grant for the co-funding investigation process.

The deadline imposed by the grant helped the group move forward through the development phases. Now that the grant term has ended, participants noted that it will be necessary to keep the group moving toward strategic outcomes and to hold regular meetings so as not to lose momentum. The majority of funders are committed to attending two to three project meetings within the next six months. Continuing the project will require some organizing support, which may prove to be a challenge for the Iowa Council of Foundations to provide, given its limited staffing capacity.

Engaging another organization that is already working on the issue, such as the Annie E. Casey Foundation, to provide organization support is a possible approach. In addition, some Network members have indicated that they could help provide some of this organizing structure. One participant is willing to take the lead on the shared Education Funders work and another is willing to track and share outcomes data about summer learning loss among the participating organizations. This arrangement will require some coordination, but working in this way may enable the group to move forward with the project without requiring additional resources from ICoF.

Lesson: Each phase of development requires different infrastructure needs. Project leaders will need to regularly evaluate the effectiveness of organizational structures to see how well they are working and what changes might be needed.

Project Successes

- 1 All ten participants noted ‘high’ or ‘moderate’ commitment to the project moving forward.
- 2 The group thoroughly vetted eight opportunities for co-funding. The process helped increase the participants’ knowledge of the issues and develop a greater understanding of the state’s educational landscape.
- 3 Although meeting attendance varied, all participants were fully engaged in the project throughout its duration.
- 4 **All participants in the project built stronger relationships with their colleagues.**
- 5 Despite the differences in the funders’ priorities and geography, they unanimously chose an issue on which to focus energy and resources.
- 6 The group learned from national and state leaders on the topic to help them make informed choices. This is significant for a state that has fewer philanthropic resources than its neighbors.
- 7 The connections made during the project may help draw in additional support for a co-funding structure.
- 8 The Iowa Council of Foundations successfully took on a new project and helped a small group of members work through a big decision. This was accomplished with no changes to staffing levels or current programming.

DOS AND DON'TS

DOS

- Use a facilitator.
- Agree on real deadlines.
- Have progressive opportunities for organizations to officially commit.
- Invite leaders within the state to share ideas with the group.
- Attend to relationship building.

- Get everyone on the same page with terminology, acronyms, and language.

DON'TS

- Allow politeness to keep the group from addressing real differences.
- Allow the group to continue treading over the same turf.
- Don't let the perfect get in the way of the good.



APPENDIX



TOOLKIT

These are some of the tools that were used in the Iowa Council of Foundations (ICoF) Ed Funders co-funding project.

Project Guiding Principles

Meeting Agendas

Each meeting was designed to move the group forward and avoid looping back and rethinking decisions made at previous meetings. This was an important principle because each meeting had a somewhat different group of attendees.

Each meeting's agenda was open enough to allow participants the opportunity to talk about their own organizations. This helped participants become more familiar with their colleagues' organizations and work.

Materials

Each meeting included a terminology key to provide terms and their definitions to ensure that all participants were familiar with terminology or acronyms and that everyone defined the term in the same way in the context of the group's discussion. This document was cumulative and grew during the course of the project.

Each meeting started with a brief recap of the group's progress to that point. This ensured that everybody understood the progress and the decisions that had been made up to that point. This also helped provide context for the discussions and decisions on the current meeting's agenda.

Every meeting agenda provided time at the end of the meeting for each Network member to present questions, reflections, and concerns for further exploration – to the full group or to the facilitator privately.

Tools to Help Determine an Issue Focus

Discovery Phase

Review of literature and case studies. **(Appendix A.)**
Funder interviews. **(Appendix B.)**

Issue Matrix and Issue Funneling Questions

At the Ed Funders July meeting, the participants used an issue matrix to help evaluate various education issues against a set of criteria **(Appendix C.)**

At the September meeting, funders had further discussion about education issues that had made the cut at the July meeting and used the questions from the issues matrix along with additional community and organization concerns, such as strategic, relational, or positioning considerations to determine an education issue that the group could focus on for co-funding. **(Appendix C.)**

Map of Iowa Programs and Efforts Addressing Grade-Level Reading

At the October meeting, the Network was presented with information about additional programs and efforts in the state that are addressing the issue of grade-level reading. **(Appendix D: Map of Grade-Level Reading.)**

ICoF Ed Funders Memorandum of Understanding (MOU)

At the November meeting, participants asked that a Memorandum of Understanding (MOU) be drafted to outline the structure of the funders' work together. **(Appendix E: ICoF Education Funders Network MOU.)**

Participants' Survey

In December, a feedback instrument was developed to gather participants thoughts about the project up to this point and outline their expectations for its next steps. **(Appendix F: Education Funders Network Survey.)**

APPENDIX A

RESOURCES

Co-funding/collaborations

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Iowa Department of Education. *Overcoming the Achievement Divide: Key Challenges and Solutions for Iowa Schools*, November 2012.

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APPENDIX B

Funder Interview Questions

Organization/Name

Date

Geographic Area served by organization (confirm and clarify from website information)

What educational issue areas does your organization fund?

- scholarships
- STEM
- K-3
- early childhood
- graduation/school completion
- higher education
- other (programs/initiatives)

Ask funder to talk about organization, desired impact in community, how the organization works in the community/service area. What are its programs/initiatives? (confirm and clarify from information on its website.)

What local issues/needs are you seeing in education?

What is your organization's response?

What is your organization's interest in co-funding?

What could co-funding do for your organization?

What needs to be in place for your organization to participate in co-funding?

What barriers, concerns, questions do you have about co-funding?

APPENDIX C

ICoF Education Funders Network/September 11 meeting

Questions from the Issues Matrix

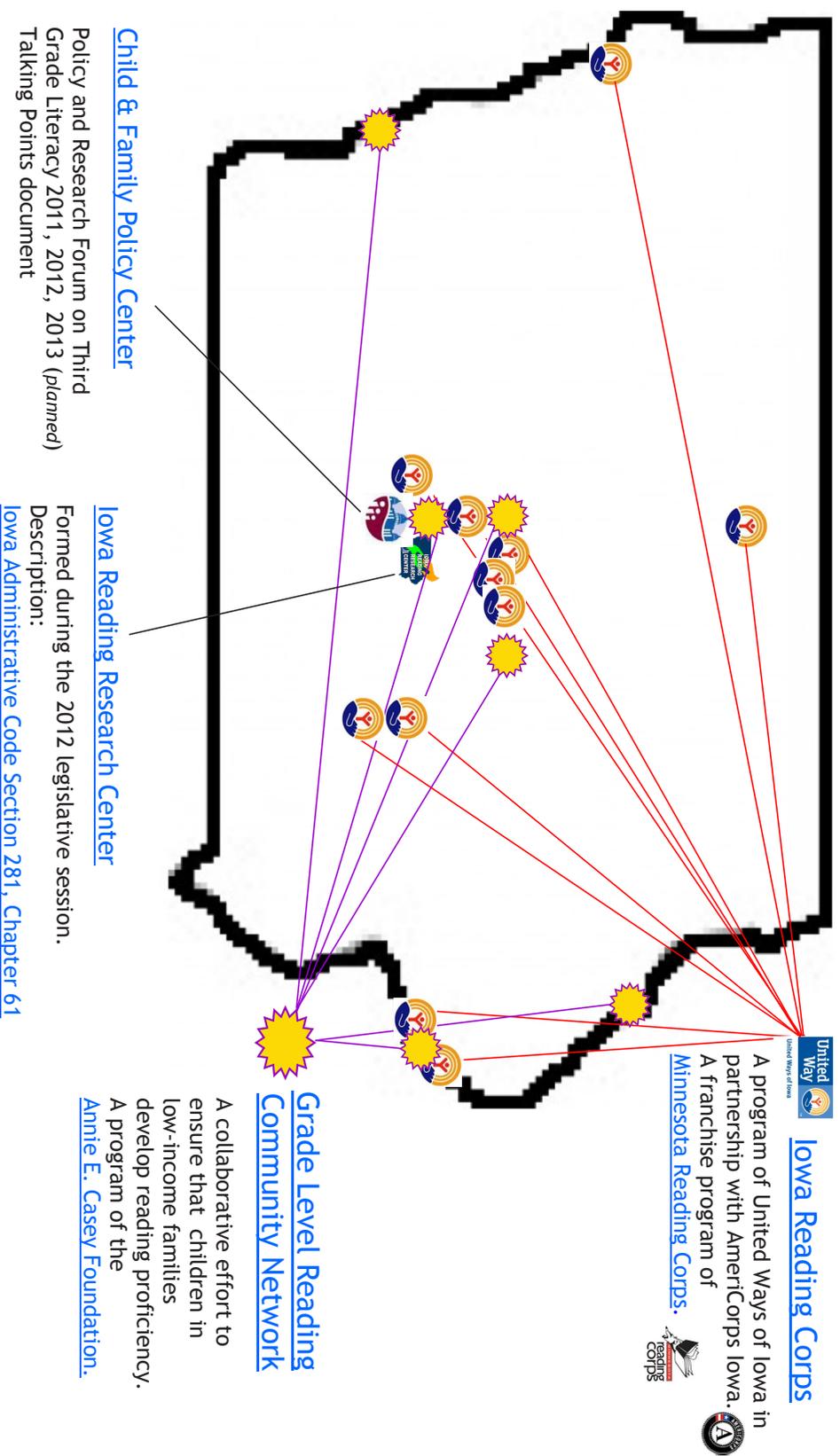
- How ripe is this issue?
- How urgent is the need?
- Does the field need another leader?
- Does the field need more than money?
- Does it align with our collective skills/knowledge?
- Through our involvement, could we draw outside resources to Iowa?
- Is there a baseline on this issue?
- Can we measure progress on this issue?
- Is this a statewide issue?
- Will our involvement strengthen philanthropy statewide/in our communities?
- Equity Concerns?

Other questions/considerations

	Early Childhood	K-3 literacy	STEM	Graduation School completion	Higher Ed general	Higher Ed Lumina	After School Summer Programs	K-12 Innovation	Other issues
How ripe is this issue? 1 2 3 4 5 not getting ready to yet there go									
How urgent is the need? 1 2 3 4 5 not growing urgent pressing concern									
Does the field need another leader? 1 2 3 4 5 crowded has a few the field key players needs us									
<i>Who's leading this now?</i>									
Does the field need more than money? 1 2 3 4 5 just \$\$ \$\$+ needs skills, needed sweat equity knowledge, etc.									
Does it align with our collective skills/knowledge? 1 2 3 4 5 steep somewhat in our learning curve wheelhouse									
Through our involvement, could we draw outside resources to Iowa? 1 2 3 4 5 unlikely perhaps very likely									
<i>Likely outside funders:</i>									

	Early Childhood	K-3 literacy	STEM	Graduation School completion	Higher Ed general	Higher Ed Lumina	After School Summer Programs	K-12 Innovation	Other issues
Is there a baseline on this issue? 1 2 3 4 5 no don't yes know									
Can we measure progress on this issue? 1 2 3 4 5 no don't yes know									
Is this a statewide issue? 1 2 3 4 5 not it's more statewide really regional									
Will our involvement strengthen philanthropy statewide/in our communities? 1 2 3 4 5 no possibly yes									
Equity 1 2 3 4 5 little moderate great disparity disparity disparity									
What are the glaring questions concerning this issue?									
Additional Questions/Thoughts									

Campaign for Grade-Level Reading in Iowa



Iowa Council of Foundations Education Funders Network Memorandum of Understanding December 2013

Background

The Iowa Council of Foundations (ICoF)

The Iowa Council of Foundations is a nonprofit, membership based organization serving grantmakers that provide funding support to charitable projects and programs in Iowa. Its membership comprises community, private, family, and corporate foundations, as well as corporate giving programs. The Iowa Council of Foundations works to strengthen and promote philanthropy in the state, facilitate and promote effective philanthropic grantmaking, and to provide a forum for members to discuss programs and issues. The organization provides opportunities for grantmakers to access information, to build skills through professional development, and to network with one another to share information about programs and priorities.

The Iowa Education Funders Network

The Iowa Education Funders Network is a learning circle with approximately ten active members, within the Iowa Council of Foundations membership. The Network provides connections and resources to grantmakers that fund within the area of education by providing information on promising tactics and trends and helping members develop personal and institutional connections. The Network provides a forum for shared action, and helps other State leaders understand the impact and ensure that representatives of the philanthropic sector are at the table during critical discussions about education in Iowa.

The Network has been functioning since Summer 2011. As it explored critical education issues in the state, members recognized that these may be too large and complex for any one grantmaker to effectively address alone. In 2013, Network members began to explore the concept of co-funding as a means to expand the impact of their grants and to leverage additional resources.

The Iowa Education Funders Network Co-funding project

In Spring 2013, the Iowa Education Funders Network clarified its project to explore co-funding and selected a consultant to facilitate the process. Participants in the project met in June, July, September, October, and November to discuss and become more familiar with education work occurring in the organizations represented in the group, to develop a deeper understanding of co-funding models, and to examine current education issues in Iowa that might benefit from a co-funding approach.

In Fall 2013, after a deliberative examination of a number of education issues, the Iowa Council of Foundations (ICoF) Education Funders Network identified the Annie E. Casey Foundation's Campaign for Grade-Level Reading as its focus area for collaborative work. The Campaign has identified three community solution areas to ensure that children in low-income families develop reading proficiency: school readiness, school attendance, and addressing summer learning loss. The ICoF Education Funders Network has agreed to focus on summer programming and strategically align the work of their respective organizations in this area to help improve grade-level reading in Iowa.

The attached Memorandum of Understanding describes how participating funders will proceed together to address this issue.

**Iowa Council of Foundations Education Funders Network
Memorandum of Understanding
December 2013**

Goal

The goal of the work together is to address issues of summer learning loss and have a positive impact on grade-level reading test scores in the participating communities.

General Principles

Funders will continue their current activities within their own communities and funding areas to address this issue. Activities will comply with their own organizational policies and protocols.

Regular meetings of the partners in this agreement are necessary to further the project and understand its impact.

A deeper understanding of the best practices in summer programming will enhance the partners' abilities to address the issue of summer reading loss in their respective communities. An examination of best practices will be part of the work together.

Expectations

In order to measure the impact of the work together, the partners agree to provide metrics about the summer programs they fund and support. Partners will track the following information and submit it to the co-funding hub:

- The name and type of programs funded
- The funding amount for each program
- The number of participants in each program
- School district summer learning loss data

Terms of Agreement

This Agreement will begin on January 1, 2014 and shall end on December 31, 2014.

_____ Organization	_____ date

Iowa Council of Foundations Ed Funders Survey

*1. Name/Organization:

*2. Were you able to participate in at least one of the Education Funders in-person meetings about co-funding (7/25; 9/11; 10/23; 11/22)?

- Yes
 No

*3. If no, what were the barriers to your attendance?

- Scheduling
 Distance
 Not an effective use of my time
 Low likelihood of my organization participating in a co-funding project
 Other (please specify)

For those who attended at least one of the Education Funders in-person meetings about co-funding (7/25; 9/11; 10/23; 11/22)

4. Working on this co-funding project has strengthened my relationships with my ICoF Ed Funder colleagues.

- Strongly disagree Somewhat disagree It did not make a difference Somewhat agree Strongly agree

5. Working on this co-funding project has increased my understanding of education issues in Iowa.

- Strongly disagree Somewhat disagree It did not make a difference Somewhat agree Strongly agree

Iowa Council of Foundations Ed Funders Survey

6. Based on what I learned in this process, I will suggest changes in our organization's approach to education.

- Strongly disagree Somewhat disagree Unsure Somewhat agree Strongly agree

7. Is working together on the Campaign for Grade-Level Reading likely to amplify the voice of philanthropy in discussions of education issues in Iowa?

- Yes
 It's unclear at this time.
 No, I don't think it would have an impact.

8. If yes, to previous, explain in what ways the voice of philanthropy will be amplified.

9. Is working together on the Campaign for Grade-Level Reading will not have an impact on the voice of philanthropy in discussions of education issues in Iowa, explain why it won't.

10. Is working together on the Campaign for Grade-Level Reading likely to generate more philanthropic resources in our state?

- Yes
 It's unclear at this time.
 No, I don't think it would have an impact.

Iowa Council of Foundations Ed Funders Survey

11. If working together on the Campaign for Grade-Level Reading is likely to generate more philanthropic resources in our state, please describe what resources you're thinking about.

12. What is necessary to move forward this co-funding project? Choose your two (2) highest priorities.

- Call and organize regular meetings
- Secure funding for projects/write grants
- Provide timely and pertinent resources
- Keep the group moving toward strategic outcomes
- Connect the group to other education resources
- Other (please specify)

13. What are you willing to contribute to the project in the next six (6) months? Check all that apply.

- Participating in 2-3 meetings with the Ed Funders Network
- Sharing data about the summer programs my organization funds
- Providing 1-2 hours a week to help lead or manage our shared Ed Funders work
- Providing 1-2 hours a week to increase activity locally on the Campaign for Grade-Level Reading
- Increasing our organization's financial investment in programs to address summer learning loss
- Other (please specify)

14. What do you anticipate gaining in the next six months by participating in this project? (please be specific)

Iowa Council of Foundations Ed Funders Survey

15. How committed are you to the Campaign for Grade-Level Reading?

- Highly committed
- Moderately, if it works for our organization
- Not sure
- Unlikely to keep participating

16. What three (3) factors helped accelerate the group's progress in co-funding? Please explain.

17. What three (3) factors held the group back in exploring co-funding? Please explain.

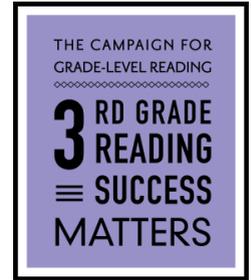
18. How will you/have you described the potential of co-funding to your board and colleagues at your organization?

19. Should the ICoF continue to facilitate OTHER co-funding groups?

- Yes, it's very important
- Maybe, if the issue is important
- No, it's a waste of resources

20. Other thoughts about this co-funding process/project?

Thank you for taking the time to provide your feedback for the Ed Funders Network co-funding project.



Ms. Laura Sauser, President
Iowa Council of Foundations
P.O. Box 13229
Des Moines, IA 50310

December 19, 2013

Dear Ms. Sauser:

The Campaign for Grade-Level Reading would be delighted and honored to count the Iowa Council of Foundations among its philanthropic partners.

On a visit earlier this year to Iowa, I was impressed and invigorated by the work and commitment of GLR Network communities across the state. Those efforts hold great promise for better outcomes for the state's children and, indeed, for setting an example to which others throughout the country can turn for inspiration and insights about what works.

How the Campaign Supports the Work in Iowa

As valued members of the GLR Communities Network, these Iowa communities are and will continue to be supported by the Campaign and its Network Communities Support Center (NCSC) in a number of ways, such as:

- A designated part-time NCSC State Lead, Becky Miles-Polka, provides a ready point-of-contact to help communities access needed information, tools and assistance to implement their Community Solutions Action Plans (CSAPs). In addition to helping individual communities, the State Lead also is charged with supporting the formation of a statewide network of communities to increase the effectiveness of Campaign assistance in the state, encourage peer exchange and learning among the communities and facilitate the identification and communication of policy and programmatic issues that need to be addressed at the state level.
- Network communities have access to resources designed to support and accelerate CSAP implementation. For example, the Community Solutions Accelerator, a members-only improved online vehicle to be launched in early 2014, will include a host of materials on a wide range of topics relevant to grade-level reading and will provide a means for peer-to-peer sharing of progress, challenges and lessons. The GLR Campaign also offers communities access to experts via webinar and, on occasion, in person, as with the visit by Hedy Chang of Attendance Works to help Iowa develop approaches to address chronic absence.
- Network communities also have access to unique opportunities that can help advance their work. For example, the Results Scorecard pilot now underway is helping communities develop metrics by which to track and report their progress; participating communities are provided with licenses to use the Results Scorecard software at no charge. Looking to the future, the GLR Campaign is planning a convening of Midwest communities in early 2014 and anticipates forming curated Communities of Practice to facilitate peer exchange among similar communities or on issues or strategies of common interest.
- Many of the nearly 50 sector-leading national organizations that are partnering or aligning their work with the GLR Campaign have state and/or local affiliates. The Campaign is actively encouraging those organizations to reach out to their affiliates and to promote their engagement with and support for Network communities.

The Role of a State Funder Coalition

While the GLR Campaign works diligently to support Network communities directly, as an endeavor launched by philanthropy, it also is committed to encouraging and assisting deeper engagement of the broader philanthropic sector in addressing the grade-level reading challenge. In particular, the convening of state funder coalitions is a significant strategic objective of the Campaign as we move to strengthen, scale and sustain the success of community campaigns.

We see these funder coalitions as an important complement to the considerable time, talent, energy, sweat equity, as well as dollars, being invested by local stakeholders. The coalitions can advance and enhance community efforts by:

- Using philanthropy's resources and voice to back and build public support for the grade-level reading agenda;
- Investing to create and strengthen the capacity and infrastructure needed to bring the grade-level reading plans to fruition and to take to scale the most effective solutions to barriers to student success;
- Encouraging longstanding partners and grantees to join the work, for instance, to intensify efforts to support and deepen the engagement of parents and caregivers in nurturing children's learning and on-track healthy development during the early years and early grades; and
- Encouraging donors to support civic action and advocacy around policies, programs and practices that can assure seamless systems of care, services and family supports from before birth through third grade.

The GLR Campaign enthusiastically welcomes your leadership in bringing Iowa's philanthropic community together to support the grade-level reading work at the state and local level and looks forward to collaborating with you toward that objective.

Becky Miles-Polka will continue to work with you on the GLR Campaign's behalf, but please know that she represents all of us at the Campaign who stand ready to support you, your philanthropic colleagues and Iowa's Network communities in moving forward with this most important work.

Sincerely,



Ralph R. Smith
Senior Vice President, Annie E. Casey Foundation
Managing Director, Campaign for Grade-Level Reading



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