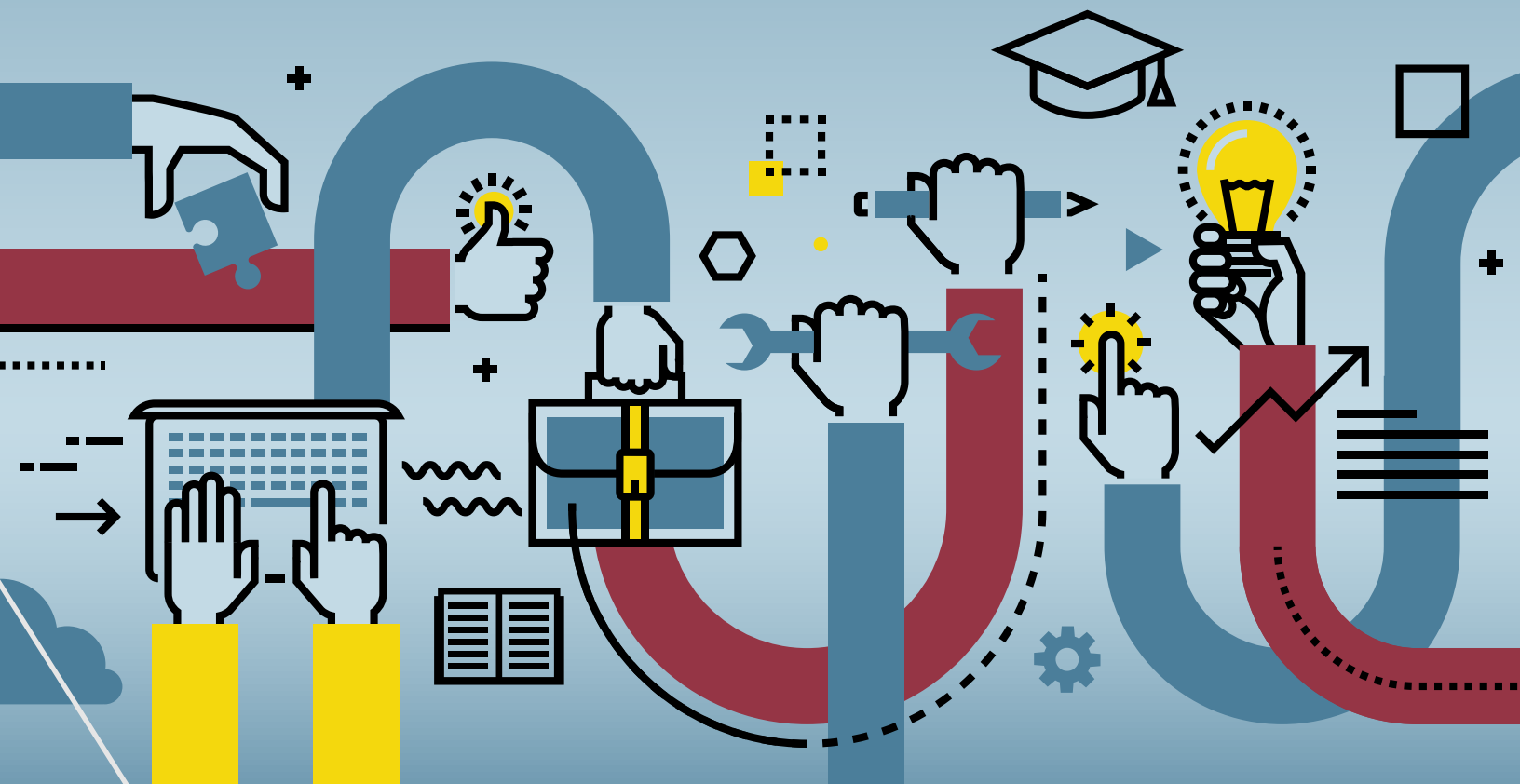


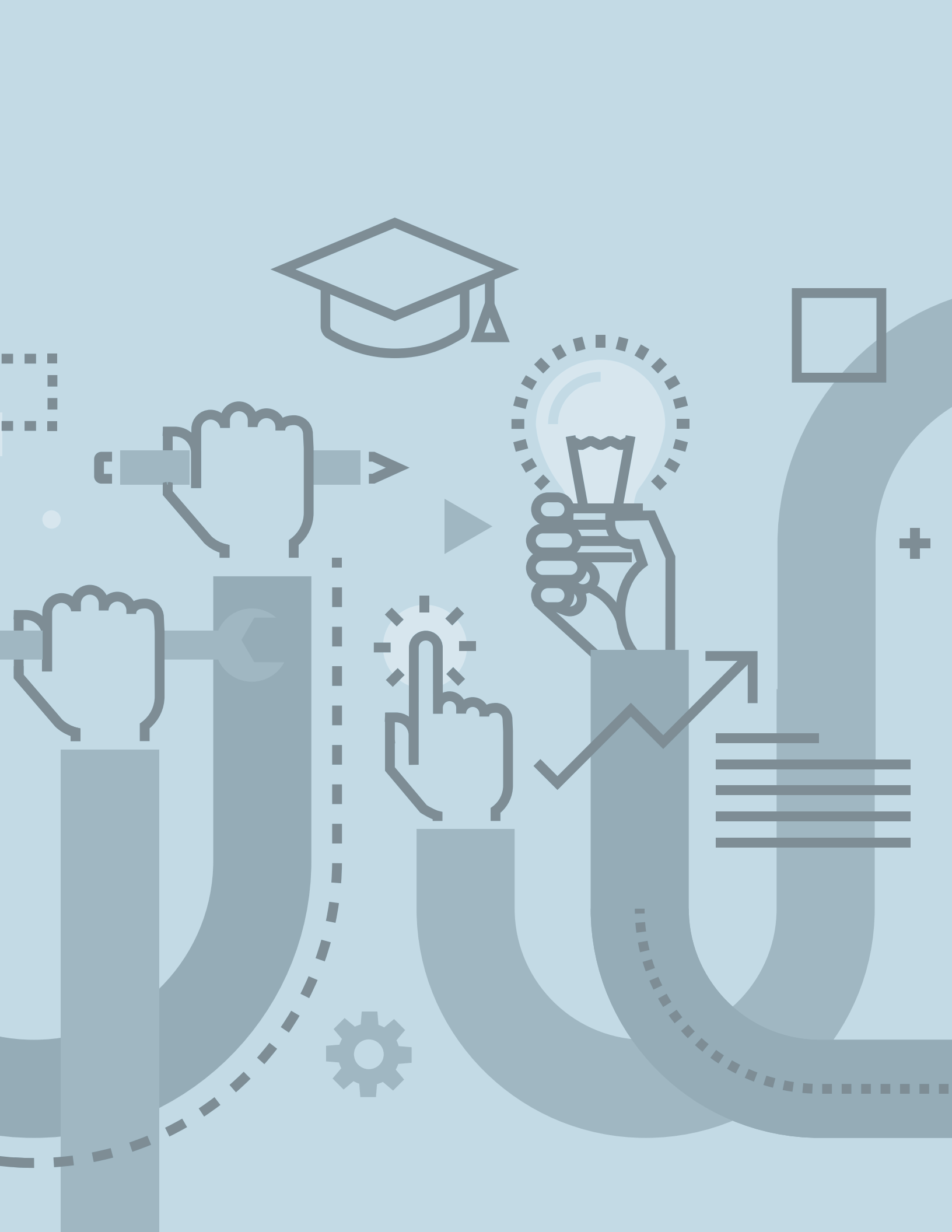
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# Making Education Everyone's Business

Three Studies of Successful Education Advocacy



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## Introduction

Business leaders have long been engaged in all levels of education reform, but the economic crisis of the 1980s spurred a renewed sense of urgency and activity. Business leaders saw education as key to addressing many of the country's economic problems, including high unemployment, foreign competition, and declining productivity.<sup>1</sup> As the economy recovered and the standards and accountability movement gained traction in the 1990s, business organizations refocused their efforts on strengthening their states' education standards as part of a broader effort to prepare students for jobs in technology and other expanding industries.<sup>2</sup>

Both the economy and the education policy landscape have evolved significantly since then. Technological advances and increasing global competition continue to change the nature of work and redefine what young people need to know and to be able to do to succeed in tomorrow's workforce, including hard skills like data analysis and web development and softer skills like communication. These skills continue to emerge as top-ranked skills for next-generation jobs,<sup>3</sup> but there's a yawning gap between the skills that employers need and the skills of the current workforce. In the manufacturing sector, for example, nearly half of the 4.6 million projected job openings between 2018 and 2028 will go unfilled due to a shortage of skilled workers.<sup>4</sup> The cost of the misalignment between skills and jobs is staggering: If companies can't find the skilled workers they need, the U.S. could miss out on nearly \$975 billion of technology-driven growth over the next decade.<sup>5</sup> These trends are unlikely to slow any time soon, and the economy will never stop evolving, so preparing students for the "future of work"<sup>6</sup> will remain a top priority for educators, policymakers, and business leaders for years to come.

*Preparing students for the "future of work" will remain a top priority for educators, policymakers, and business leaders for years to come.*

*The voices of business leaders can be powerful tools to help shape policy, champion programs, and advocate for greater coordination and alignment between the K-12, higher education, and workforce systems.*

Business leaders have a critical role in ensuring that our education systems enable young people to gain the skills, knowledge, and experiences they need to be successfully employed in the current and future economy. Their voices can be powerful tools to help shape policy, champion programs, and advocate for greater coordination and alignment between the K-12, higher education, and workforce systems.<sup>7</sup>

Despite the long history of overlap between the education and business sectors, however, relatively little research has examined how business organizations successfully advocate on behalf of education policy priorities. This paper seeks to do just that. It profiles three business advocacy organizations (see Table 1) that have recently supported successful education legislation, with the goal of surfacing lessons that are broadly applicable to other business advocacy organizations interested in pursuing education advocacy work on behalf of students' long-term economic success.

Table 1 Overview of Case Study Organizations

	Colorado Succeeds	Washington Roundtable	Metro Atlanta Chamber (MAC)
Overview	<ul style="list-style-type: none"> <li>• <b>Founded in:</b> 2006</li> <li>• <b>Core policy issue areas:</b> education</li> <li>• <b>Number of employees:</b> 10</li> <li>• <b>Annual budget:</b> \$3.7 million</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Founded in:</b> 1983</li> <li>• <b>Core policy issue areas:</b> education, transportation, economic development</li> <li>• <b>Number of employees:</b> 7</li> <li>• <b>Annual budget:</b> \$4 million</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Founded in:</b> 1859</li> <li>• <b>Core policy issue areas:</b> education, business climate, infrastructure, natural resources</li> <li>• <b>Number of employees:</b> 57 (total), 2 (working on education)</li> <li>• <b>Annual budget:</b> \$16 million</li> </ul>
Mission	<p>Colorado Succeeds is a nonprofit, nonpartisan organization that brings business leaders across the state together to ensure all of Colorado’s children are educated to their greatest potential.</p>	<p>Washington Roundtable members work together to effect positive change on public policy issues that they believe are most important to supporting state economic vitality and fostering opportunity for all Washingtonians.</p>	<p>MAC works to position metro Atlanta as a top-tier global region by focusing on three key areas: economic development, public policy, and promotion of the Atlanta brand.</p>
Core Bodies of Work	<ul style="list-style-type: none"> <li>• <b>Policy:</b> Advocate for system changes that create a more responsive, learner-centered educational model</li> <li>• <b>Practice:</b> Put policies into practice by working with early adopters</li> <li>• <b>Philanthropy:</b> Infuse philanthropy into the work of policy and practice and create a synergistic approach to funding innovation on a large scale</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Thought leadership:</b> Conduct studies and reports that support a forward-looking vision for Washington state and translate into actionable policy priorities</li> <li>• <b>Advocacy:</b> Position the business community as a thoughtful advocate for policies that support economic vitality and expand opportunity for all Washingtonians</li> <li>• <b>Coalition building and communications:</b> Communicate with key audiences and engage broad-based coalitions to build awareness and drive support for priorities</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Grow:</b> Recruit new companies, retain existing companies, and help existing companies continue to grow throughout the region</li> <li>• <b>Advocate:</b> Advance policies that enable the region to attract a talented workforce, foster a high quality of life, lift those in need, and move the region forward</li> <li>• <b>Promote:</b> Market the Atlanta brand to attract new businesses and top-notch talent</li> </ul>
Education Policy Priorities	<ul style="list-style-type: none"> <li>• Career-connected learning and Science, Technology, Engineering, and Math (STEM)</li> <li>• Choice and competition</li> <li>• Early childhood education</li> <li>• School finance</li> <li>• Accountability and measures of student success</li> </ul>	<ul style="list-style-type: none"> <li>• Drive progress toward the goal of 70% of Washington students earning a postsecondary credential by age 26</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a globally competitive workforce</li> <li>• Increase retention of Georgia’s postsecondary graduates</li> <li>• Strengthen education pathways</li> <li>• Prepare educators and educational leadership to maintain and bolster effective instruction</li> <li>• Encourage innovation and promote STEAM (STEM, plus Arts) and career and technical education</li> <li>• Boost early learning</li> </ul>

## Key Findings

The three organizations we profile offer insights into different approaches for business organizations to engage in education advocacy. Colorado Succeeds is a single-issue nonprofit, working only on education. For the Washington Roundtable, education is one of a handful of priorities. The Metro Atlanta Chamber (MAC) is a large, regional chamber of commerce that works on education as one of dozens of issues. Each organization is instructive in its own right. Collectively, they also offer key insights and lessons for other business advocacy organizations looking to drive change in the education sector. Our research surfaced three themes that hold true across the organizations we profiled and are important for others considering the potential of the business community to drive change in education. Successful business advocacy organizations:

- 1 **tailor their agendas and value propositions** to meet specific, local needs
- 2 are strategic in how they **leverage staff, external supports, and funding sources**
- 3 leverage both **collective and individual voices** to advance their agendas

These themes are based on analysis of successful business advocacy organizations' history, mission, current policy agenda, staffing, and financial models, along with in-depth interviews of organization leaders, members, and partners. We discuss each theme below, and readers can find detailed case studies of each organization on our [website](#).

## THEME 1

### Successful business advocacy organizations tailor their agendas and value propositions to meet specific, local needs.

*It is essential for organizations to have a unique value proposition that addresses pressing local needs.*

In speaking with the leaders of business advocacy organizations — as well as their members, funders, and other partners — it became clear that it is essential for organizations to have a unique value proposition that addresses pressing local needs. A clear value proposition shapes the organization’s mission and priorities, and how it assesses impact. And, since no organization operates in a vacuum, a clear value proposition helps stakeholders understand what it offers that is distinct from other advocacy organizations or business associations in their area.

To develop a clear value proposition, a business advocacy organization must assess the landscape in which it operates, identify gaps that need to be filled, and decide whether and how it can position itself to fill those gaps. Far from being a one-time consideration, organizations must assess and reassess their value proposition periodically to maintain their relevance as their landscape evolves.

#### **Finding 1: Successful business advocacy organizations clearly identify, quantify, and build awareness about a problem to be solved.**

All three organizations profiled here have identified and quantified specific gaps in their respective states’ education and workforce outcomes and have worked to build awareness about the need to address those gaps.

Whether they conducted research themselves or contracted with others to do so, all have sponsored reports that lay out the current education and business needs in the state. These reports help the organizations define a need in the field and craft a value proposition that is responsive to that need. They also help organizations build awareness about the need, as part of a strong messaging and communications campaign.

For example, Colorado Succeeds has anchored its value proposition around the need to strengthen long-term outcomes for Colorado’s young people. It cites what is commonly known as the “Colorado Paradox” — that is, the state ranks among the top five nationally in terms of most-educated adult populations, but among the lowest in education outcome measures such as high school graduation rates. Research that quantified the Colorado Paradox informed Colorado Succeeds’ policy focus on rethinking high school funding, addressing system barriers that constrain postsecondary pathways, and blurring the lines between high school and postsecondary education in terms of how students earn credit.

Similar to Colorado, both the Roundtable and MAC commissioned research or aggregated data that demonstrated a huge gap between the number of students who go on to complete postsecondary credentials and the projected number of job openings that will require a postsecondary credential.



In Washington, the Roundtable leveraged its research to create a messaging campaign around recent legislation to drive postsecondary credential attainment in the state. In 2016, it commissioned a report analyzing the state's future employment growth alongside outcomes for its high school graduates. The research projected that the state would have 740,000 job openings between 2016 and 2021.<sup>8</sup> A majority of these jobs will require some college or a postsecondary credential, while just 31% of Washington's high school graduates go on to earn a postsecondary credential by age 26.<sup>9</sup> Based on the findings of the report, the Roundtable set a goal: By the graduating class of 2030, 70% of Washington's high school graduates would go on to earn a postsecondary credential by age 26.

These two numbers – 740,000 job openings and the 70% attainment goal – became ubiquitous. Stakeholders across the state, including educators, advocates, employers, and legislators, constantly referenced these two numbers. They became an easy and straightforward way for advocates to talk about the need and build support for legislation aimed at driving progress toward the goal. This messaging was key to the Roundtable's advocacy on behalf of the Workforce Education Investment Act – credential attainment legislation that policymakers enacted in 2019.

For business advocacy organizations to develop a clear value proposition, their agendas should address local needs, substantiated by research. Their communications campaigns can help elevate the issue (and their value proposition in addressing that issue) to the field.

### **Finding 2: Successful business advocacy organizations differentiate their value proposition for various stakeholders.**

Business advocacy organizations have a variety of stakeholders, including member organizations, policymakers, other advocacy groups, and (often) funders. They must differentiate their value proposition to ensure that each stakeholder sees value in the organization's work.

For **member organizations**, business advocacy organizations typically provide three benefits: marketing and branding opportunities, in which member companies have opportunities to sponsor prizes, competitions, or other public events; networking opportunities, in which the leaders of member companies have opportunities to meet and build relationships with other leaders; and the opportunity to see the impact of their work by connecting directly with educators and students.

Both Colorado Succeeds and the Washington Roundtable have worked to provide their members with opportunities to see the impact of their work, primarily by enabling them to connect directly with educators. Colorado Succeeds launched the Homegrown Talent Initiative, which brings business leaders together with leadership from their local school districts, higher education institutions, and students and families to define the skills and competencies that high school graduates need to be successful in their community.<sup>10</sup> In

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*The variety of opportunities that business advocacy organizations offer their members help keep members engaged in long-term initiatives.*

Washington, the Roundtable has developed a leadership development program that partners business and school leaders and provides an avenue for peer learning and problem-solving. (After shifting its membership toward regional companies, MAC intentionally focuses on providing its members with networking and professional development opportunities rather than hands-on engagement in the work.)

The variety of opportunities that business advocacy organizations offer their members help keep members engaged in long-term initiatives. Driving real, meaningful improvement in a state's education systems cannot be accomplished in just a few months. It can take years, even decades to see real impact. So, while business advocacy organizations focus their agendas on these long-term changes, they provide shorter-term benefits to their members, which help keep those members engaged for the long haul.

Business advocacy associations' value proposition to **policymakers and other advocacy groups** is often as sources of knowledge and insight on education policy issues. Legislators and legislative bodies sometimes lack institutional knowledge and historical perspective, especially in state legislatures with term limits and higher rates of turnover. Business advocacy organizations can often help fill this gap.<sup>11</sup> The business organizations we profiled are knowledgeable about the history of education policy in the state – how education policies have evolved over time, what has worked and what hasn't, and how it has affected the state's business and economic landscape.

Moreover, business advocacy organizations have issue area experts; those we spoke to had a strong handle on key trends in high school graduation rates, gaps in performance among student subgroups, postsecondary enrollment and completion data, and the number and types of jobs projected statewide. This builds business advocacy organizations' reputation as a go-to resource for legislators on issues of education. In addition, other advocacy groups that work across multiple issue areas beyond education often rely on the business advocacy organization for their education expertise.

Through their knowledge of current and historical trends in state education, Colorado Succeeds, Washington Roundtable, and MAC each establishes itself as a source of expertise and analysis for policymakers and other advocacy groups. This often results in the organizations' leaders and members being called on by legislators, either asked to testify on behalf of legislation or being appointed to (or asked to join) education-related task forces or other statewide initiatives.

Finally, many business organizations must also differentiate their value proposition to **funders**, including corporate charities, foundations, and individual donors. Unlike the members of business advocacy organizations, funders aren't paying dues to the organization in order to advance their brand or to build their networks. And while funders may benefit from the knowledge and expertise of business advocacy organizations, that's typically not what motivates them to engage either. Rather, funders often invest in a business

advocacy organization when the organization is positioned to advance an issue that the funder believes is important and will have a positive impact on students and families.

In many cases, business advocacy organizations can be stewards for issues that extend beyond an individual piece of legislation or program. The Washington Roundtable, for example, focuses on improving credential attainment. In addition to the Workforce Education Investment Act that the Roundtable helped pass in 2019, its work on credential attainment can include everything from rigorous K-12 standards and educator quality to postsecondary programming and workforce readiness. The funders that support the Roundtable's education work (via their affiliated 501(c)(3), Partnership for Learning) know that these funds are used to advance a body of work that will ultimately improve education and economic outcomes for young people statewide.

Colorado Succeeds also receives substantial philanthropic funding and it, too, functions as a linchpin for broader education reform efforts statewide. Colorado Succeeds has specifically elevated philanthropy as one of its three strategic pillars, alongside policy and practice, with the goal of creating a whole that is greater than the sum of its parts. With philanthropic support, Colorado Succeeds provides funders more than an isolated education policy advocacy effort; it is able to catalyze members, policymakers, and other advocates to coordinate and collaborate on more systemic change.

Philanthropic funding is key to Colorado Succeeds' work and for enabling the Roundtable's work on education. Both organizations are careful to ensure that the projects are mission-aligned, however, since philanthropic funding can create strong incentives to take on work that can distract from an organization's key goals and priorities.

Business advocacy organizations have numerous stakeholders and they must differentiate their value proposition to each one. Importantly, the value that business advocacy groups provide to various stakeholders must be mutually reinforcing. For example, the value that these groups provide to policymakers helps build relationships in the legislature that are critical for advancing policy proposals; the ability to advance policy proposals helps demonstrate business organizations' value to their members. Meanwhile, funders that invest in advancing an issue at a systemic level want to know that business organizations are able to leverage an active membership for legislative wins.

*The value that business advocacy groups provide to various stakeholders must be mutually reinforcing.*

### **Finding 3: Successful business advocacy organizations provide multiple membership options to meet different needs.**

Each of the organizations we profile provides multiple membership options for interested businesses. An analogy from the private sector seems appropriate: Gyms often provide different tiers of membership, from basic memberships that offer access to fitness machines to fully loaded memberships that include unlimited classes and personal training; they have something to offer customers with a variety of needs, preferences, and budget constraints. A business advocacy organization can do the same by providing different tiers of membership.

Colorado Succeeds has several different tiers of membership, each associated with different benefits. Businesses paying around \$5,000 per year have access to meetings and briefings that Colorado Succeeds hosts, access to networking opportunities within the Colorado Succeeds network, and support in getting placed on local boards and commissions. In turn, their dues support Colorado Succeeds' broad policy agenda. Businesses paying in the \$25,000-per-year range get all of those benefits plus sponsorship of the Succeeds Prize, an annual, televised event that honors innovative school districts and educators. Businesses paying \$40,000 per year directly support Colorado Succeeds' programmatic work.

MAC has just two tiers of membership. Investors, companies that pay \$2,500 in dues annually, are listed in the online directory and have access to community events, professional development and social engagements, leadership events, and small group connection opportunities. The second tier is the board of advisors, for whom dues are \$10,000 annually. Members at this level are given opportunities to serve on local boards and leadership councils, access to board of directors meetings and meetings with key business and community leaders, and invitations to special VIP events.

Washington Roundtable's dues structure is different; companies pay an amount based on their number of in-state employees. As a result, all members have access to the same set of benefits, which include networking opportunities with other business leaders and direct connections to legislators.

Of course, creating different levels at which members can engage has the benefit of broadening the organization's revenue base and enabling the resources necessary to remain effective and flexible.

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#### **Finding 4: Successful business advocacy organizations are agile and able to adapt their value propositions and agendas to changing needs.**

Clarity is essential when business advocacy organizations define their value proposition. At the same time, they must be willing and able to adapt. This has been critical to the continued viability of Colorado Succeeds, MAC, and the Washington Roundtable.

Since its founding in 2006, Colorado Succeeds has made two key strategic shifts. First, when the organization launched, its primary focus was K-12 education policy. Over time, as the needs of Colorado's business community evolved and its connection to both early education and postsecondary became more apparent, Colorado Succeeds' leadership broadened its scope to include the full education spectrum, from early childhood through postsecondary. Second, and more recently, Colorado Succeeds has taken on a new body of work, supporting early adopters in implementing the policies it helps to pass. In both cases, Colorado Succeeds saw those needs shifting and was able to adapt accordingly.

MAC, too, has shifted its strategy in recent years. Prior to 1990, MAC was known as the Atlanta Chamber of Commerce. However, in response to the region's rapid growth and the evolving needs of surrounding companies, the Atlanta Chamber rebranded itself as the Metro Atlanta Chamber, to signal a shift in focus to the prosperity and growth of the entire region, rather than only the city of Atlanta. Then in 2014, when MAC's current president and CEO came on board, the organization underwent another shift. This time, MAC shifted its targeted membership base from smaller companies to larger, more regional ones in order to take advantage of their collective regional power.

In Washington, the Roundtable underwent a functional merger with nonprofit Partnership for Learning (PFL). The merger was a gradual response to a changing landscape of education advocacy. When PFL first launched in the early 1990s, it was the only organization advocating for standards-based reform. However, as more organizations entered the landscape, its value proposition became harder to distinguish. PFL first rebranded itself as the education foundation of the Washington Roundtable and, as the organizations' agendas became increasingly aligned, the two boards made the decision to functionally merge the organizations. Steve Mullin, who had previously served as PFL's executive director and as the president of the Roundtable, took on the role of president of both organizations. He aligned the two agendas and reorganized the staffing and financial structures accordingly.

In addition to successful organizational shifts, the three organizations also remain internally nimble. This means that, while they have clear policy priorities and aligned agendas, they're able to pivot if and when policy windows open up. In Washington, for example, the end of the decade-long *McCleary v. Washington* lawsuit, which required lawmakers to redesign the state's K-12 education funding formula, meant that there was an opening to make a big move on higher education. The Roundtable was ready with research-supported policy ideas. In Atlanta, MAC's education policy team was able to take advantage of the city's bid for Amazon's second North American headquarters to make a push for improved computer science access in middle and high schools across the state.

The agility that these three organizations demonstrate has been key to their success over time. They're not only able to make large, structural shifts that better position them to be effective in their work, but are also internally agile and able to take advantage of policy opportunities as they emerge. Both are essential to maintaining the organizations' value proposition in a constantly evolving field.

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## **To develop tailored agendas and value propositions that meet specific, local needs, business advocacy organizations should:**

### **Make research and communications a central part of the organization's value proposition.**

- Invest in research to help various stakeholders understand where there are unmet needs in the education system and how the business advocacy organization can help address them.
- Execute savvy communications campaigns that leverage research and increase the salience and alignment around priority issues.
- Establish themselves as credible resources and experts on the state of education, on whom their members, policymakers, and other advocates can rely.

### **Differentiate the organization's value proposition for key stakeholder groups.**

- Articulate a clear value proposition for each stakeholder group — including members, policymakers, other advocacy groups, and funders.
- Ensure the organization's value propositions to multiple stakeholder groups are mutually reinforcing or, at a minimum, not in conflict.
- Provide business members with a variety of avenues to engage, from hands-on experiences with educators to opportunities to speak directly with legislators. Multiple entry points can ensure an organization appeals to a wide variety of potential members.

### **Provide multiple membership options for businesses.**

- Provide tiered membership structures that enable members with various resource levels and competing priorities to engage in ways that most meet their needs.

### **Prioritize agility to enable effective responses to an evolving landscape.**

- Read the landscape in which they operate and adapt the organization's value proposition when necessary. Strategic shifts help organizations be responsive and maintain their relevance; business advocacy organizations are no exception.
- Maintain enough internal flexibility so that the organization can respond and engage when unpredictable policy windows open.

## THEME 2 **Successful business advocacy organizations are strategic in how they leverage staff, external supports, and funding sources.**

Business advocacy organizations must develop staffing structures and funding streams that support their work. To do so, they must have a deep understanding of their local context, assess the level of dues they can expect from members given the unique value they provide, and ensure that resources are clearly aligned to the organization's mission. They must also be strategic in how they staff their organizations, and consider carefully when and how they can leverage external supports to boost the capacity of their teams.

### **Finding 5: Successful business advocacy organizations leverage targeted external supports to bolster their teams' capacity.**

Business advocacy organizations are not immune to the pressures of having limited resources; in addition, there can be substantial ebbs and flows to their work. Short legislative sessions can be a whirlwind of frenetic activity, and business advocacy organizations must be equipped to take advantage of fleeting policy windows when they occur. At the same time, one of the key value propositions of business advocacy organizations is often their steady presence, expertise, and historical perspectives. Business advocacy organizations must adopt a staffing model that allows them to dial up their activity when needed, without creating undue instability when activity dials back down.

*Business advocacy organizations must adopt a staffing model that allows them to dial up their activity when needed, without creating undue instability when activity dials back down.*

How business advocacy organizations go about this depends on a number of factors, including the size, skills, and expertise of their full-time staff — as well as whether the organization focuses only on education or on a broader set of policy issues. Frequently, however, business advocacy organizations opt to use external supports for targeted components of their work, such as lobbying or research. These external supports can bolster the capacity of small teams while allowing organizations to remain lean and nimble in their staffing models.

Both Colorado Succeeds and the Washington Roundtable are relatively small organizations. Colorado Succeeds has a total of 10 employees, and the Roundtable has seven. Both organizations rely on outside contractors to increase their capacity for short periods of time. Colorado Succeeds, for example, develops its policy agenda in-house but hires external contractors to conduct research, develop policy proposals, and lobby policymakers during legislative sessions. This is essential for the small organization, but also requires it to be particularly intentional about how it maintains its visibility and relationships.

Washington Roundtable also contracts out for lobbying, as well as research and policy development for its work on transportation and statewide economic development. Since the Roundtable's merger with PFL, PFL staff have provided the skills and expertise to conduct similar research and policy development on education in-house. Washington Roundtable is also increasingly doing editorial work internally, such as writing press

releases or editorials. While Washington Roundtable is quite a small organization, one of the key changes coming out of the Roundtable-PFL merger was the reorganization of staff by function instead of content area. For instance, their communications manager works across all three issues that the Roundtable focuses on.

This is also the way that the MAC team is organized. As a much larger organization of nearly 60 staff members – with ten employees dedicated to policy, two of whom are specifically dedicated to education – they only contract out for lobbyists. They’re able to tap into the expertise of other internal teams to support various aspects of their education policy work. For instance, MAC’s education policy staff members can rely on the organization’s economic development experts for data or research on statewide economic trends, which can inform the education team’s policy agenda related to developing an educated workforce. While this increases MAC’s capacity to do work in-house and flexibly deploy staff with different skills to support different policy issues, organizations that advocate on multiple issues will have times when they need to choose where to focus their resources, and education may at times be deprioritized.

*Contracting with external partners can help smaller organizations augment their capacity for short-term needs, but requires them to be especially thoughtful about maintaining their own profile and relationships with key partners.*

There is no “right” way to staff a business advocacy organization; each organizational model has tradeoffs. The narrower the policy focus of the entity, the narrower its value proposition, funding base, and therefore staffing. Contracting with external partners can help Colorado Succeeds and Washington Roundtable augment their capacity for short-term needs, but requires them to be especially thoughtful about maintaining their own profile and relationships with key partners. Meanwhile, organizations like MAC, with a broader set of focus areas, will tend to be larger and have more internal capacity to flex in response to key priorities and more continuity with external partners. However, education may not always be their top priority.

### **Finding 6: Successful business advocacy organizations maintain at least one staff member solely dedicated to education.**

The organizations we profiled have very different organizational, financial, and staffing structures, but they have one thing in common that should not be taken for granted: They all have staff dedicated to education issues.

Colorado Succeeds focuses only on education, so having staff dedicated to education is a bit tautological. But for the Washington Roundtable and MAC, which have other issue areas of focus, they have been able to maintain a focus on education policy despite competing priorities and obligations.

The PFL merger provides the Washington Roundtable with philanthropic funding, which can only be used to fund education policy work. As a result, the Roundtable has two full-time staff members doing only education work and an additional three staff members who spend 50% of their time on education policy work. A separate budget and dedicated funding helps to ensure that the Roundtable continues to prioritize its work on education.



Out of its 57 staff members, MAC has two who are focused only on education — more staff than it dedicates to many other issues it works on. While two staff members is a small percentage of the entire team, it ensures that MAC sustains its institutional memory on education issues and that education does not get lost among other priorities. As other teams pivot, or other policy issues arise, two staff members continue to work on education policy.

Most relevant to business advocacy organizations that focus on multiple issues, having staff members dedicated specifically to education ensures that education remains an area of focus, regardless of any other priorities the organization is pursuing. It also ensures that these staff members have the depth of knowledge necessary to deliver on the organization's value proposition as credible sources of insight and information on education issues.

**Finding 7: Successful business advocacy organizations assess their context and raise revenue accordingly.**

Along with implications for business advocacy organizations' staffing structure, the breadth of issues they work on also has implications for their funding sources. An organization with a singular focus on education will also have a narrower (if deeper) value proposition to member organizations; moreover, when a single-issue organization exists alongside multipurpose organizations, it may be difficult to convey a distinct value proposition. Both constraints will affect how and where business advocacy organizations find revenue.

This plays out with the three organizations profiled here. One of the key differentiating factors is their reliance on membership dues versus philanthropy. MAC has by far the broadest scope of work, both within its policy team and across the organization as a whole; it generates almost all of its revenue from membership dues. The Washington Roundtable covers three key areas: education, transportation, and statewide economic development. All of the Roundtable's revenue comes from membership dues, while all of PFL's comes from philanthropy. While the two organizations maintain separate budgets, looking at their combined budgets results in a breakdown of 40% dues and 60% philanthropy. Colorado Succeeds, focusing exclusively on education, receives 75% of its revenue from philanthropy.

MAC is a large organization with the mission to drive regional development. It covers topic areas ranging from transportation to sports to entrepreneurship. This broad set of issues allows it to cast a much wider net in terms of the businesses and organizations that are willing to pay for a membership. With a narrower set of policy issues, Colorado Succeeds and Washington Roundtable have a smaller pool of potential members. Moreover, organizations with a narrower focus are more likely to operate alongside organizations looking to engage the business community on other issues — and may have to compete for companies' attention and resources.

With a sample of three business advocacy organizations, it's impossible to assert a clear relationship between the organization's scope and its reliance on member dues versus philanthropy. Rather, an organization's revenue sources are likely the result of

*The breadth of issues a business advocacy organization works on has implications for their funding sources.*

many interlocking factors, including the organization's scope of work, the existence and effectiveness of other business advocacy organizations, the degree to which education is a top priority for policymakers, the size and financial resources of the business community, and the availability of willing and able philanthropic partners — not to mention the effectiveness with which the business advocacy organization defines, differentiates, and communicates its value proposition. A business advocacy organization should consider all of these factors in determining potential sources of revenue.

### **To successfully leverage staff, external supports, and funding sources, business advocacy organizations should:**

#### **Leverage staff and external supports in alignment with the organization's needs.**

- Consider carefully how to staff the organization and how to leverage external supports to bolster capacity. An organization's staffing needs will vary based on factors such as the size of the organization and the breadth of issues it covers, and there is no "right" approach. It is most important that organizations are thoughtful in their strategy.

#### **Dedicate staff to sustaining work on education.**

- Dedicate staff to advance the organization's education priorities and protect education from being crowded out when other issues rise to the top of the organization's priority list. This is particularly important for business advocacy organizations that cover multiple topics and issue areas.

#### **Develop a revenue model that fits the organization's context and needs.**

- Analyze the landscape of education advocacy groups and business associations to understand how to best compete for members' resources. Most business advocacy organizations rely on member dues for at least a portion of their revenue, but this can vary widely based on the breadth of the organization's focus areas, the presence of other advocacy organizations, and the prioritization of education among many state policy issues.
- Assess the need and availability of philanthropic funding. Especially for business advocacy organizations that focus solely on education, philanthropy may be a necessary source of additional revenue. Organization leaders must consider the existence of funders with aligned priorities; the organization's value proposition in relation to other advocacy organizations; and whether philanthropy would enable the organization to take on an additional, needed body of work.

### **THEME 3 Successful business advocacy organizations leverage both collective and individual voices to advance their agendas.**

Having a clearly defined value proposition, a strong agenda, and strategically aligned resources are essential ingredients for advocacy organizations, but they are no guarantee for success. For each of the three organizations profiled here, strong partnerships, and an ability to leverage both collective and individual voices, have been core components of their advocacy work.

#### **Finding 8: Broad coalitions are a core component of successful business advocacy organizations' advocacy efforts.**

Regardless of the specific education issue involved, all three of the business advocacy organizations spoke of the importance of building broad coalitions in support of their efforts. The typical composition of successful coalitions includes the business community (e.g., chambers of commerce, leaders of businesses particularly affected by the specific issue, etc.), the education community (e.g., other education organizations, school district leaders, higher education leaders, etc.), other nonprofits working on similar or adjacent issues (e.g., STEM, workforce development), labor (e.g., relevant union leadership), and, in some cases, students, families, and/or alumni. Ensuring diversity of perspectives (e.g., racial, geographic) is also necessary and powerful. The broader the coalition, the more likely it is to capture the attention of lawmakers. This is especially true when stakeholders who are often on opposite sides of an issue — such as business and labor — are able to come together to advocate for a given education priority.

*The broader the coalition, the more likely it is to capture the attention of lawmakers.*

A broad coalition helped get the attention of lawmakers in Washington when the Roundtable pushed for credential attainment legislation. The Roundtable tends to have a reputation as focusing on policy issues that are most relevant to traditional four-year postsecondary institutions. However, the postsecondary credential legislation was much broader than that. The Roundtable had to do some legwork to get two-year and other credentialing institutions on board. They were eventually able to do so, in part due to the relationships that PFL had with representatives of those institutions.

In Colorado, Colorado Succeeds' BizCARES network, which includes organizations such as local chambers of commerce, economic development organizations, business roundtables, and industry associations throughout the state,<sup>12</sup> is a critical component of gaining statewide support for Colorado Succeeds' agenda.

In addition to the composition of the coalition, who is leading it can be particularly important. In Atlanta, the coalition that advocated for computer science legislation was initially chaired by another local organization, Project Lead the Way. The focus of the original coalition was on a broader set of issues related to STEAM education. MAC joined the coalition alongside a dozen or so other organizations. However, as the goals of the coalition evolved and became more narrowly focused on computer science, MAC, which was already doing work on that particular issue, was asked to take over and chair the coalition.<sup>13</sup>

Successful business advocacy organizations demonstrate thoughtfulness both about the composition of the coalitions they build and whether they lead or follow.

**Finding 9: Successful business advocacy organizations allow the business community to speak as a collective voice, while also strategically leveraging voices of individual business leaders.**

One of the value propositions that business advocacy organizations offer their members is the opportunity to connect directly with legislators and the ability to speak on behalf of the business community on relevant issues. Leaders of the organizations themselves often meet with legislators to share concerns and priorities on behalf of their members, as well. There's often tremendous power in the ability of an organization leader to speak on behalf of the collective business community. Leaders across all three organizations indicate that, more often than not, the collective voice of the business community, especially in conjunction with voices from other sectors as part of a coalition, is compelling.

However, there are also times when the benefit comes from having an individual business leader go to the capital to testify on behalf of legislation, to speak directly with legislators, or to join committees or boards. In Washington, for example, the Roundtable's CEO recently connected the president of a local wealth management firm with an opportunity to sit on the state's student achievement council. That business leader has previous state-level experience, making him a good fit for the opportunity, and having a Roundtable member on the council gives the Roundtable a voice in the committee's work.

In Atlanta, MAC leaders indicate that they occasionally call on CEOs to make phone calls — especially if a pressing issue or emergency arises, where there's not enough time to put together a meaningful coalition.

Successful business advocacy organizations understand the difference between these two advocacy approaches and are strategic in their deployment of collective versus individual voices.

*Successful business advocacy organizations are strategic in their deployment of collective versus individual voices.*

**Finding 10: Legislative champions help push forward business advocacy organizations' priorities.**

*Without individual support in the legislature, legislation has a hard time penetrating, no matter how strong the coalition is or how compelling the research may be.*

Another consistency across all three organizations' advocacy efforts was the primacy of a legislative champion. Without that individual support in the legislature, legislation has a hard time penetrating, no matter how strong the coalition is or how compelling the research may be. Leaders in all three organizations spoke clearly about the need to cultivate ongoing relationships with state legislators, understand their priorities and interest areas, and be strategic in building on those relationships to advocate for certain priorities. It is particularly important to invest in relationships with policymakers early and often, so that there is already a sense of trust and collaboration when legislation comes into play or when a policy window opens.

In Colorado, for example, Colorado Succeeds worked to help pass legislation to create a career development incentive program that incentivizes school districts and charter schools to encourage students to earn industry credentials while in high school. Colorado Succeeds' team members used their networks and relationships to cultivate strong legislative champions for this program. Both Crisanta Duran, the speaker of the House, and Daneya Esgar, who represents Pueblo, Colorado, championed the legislation and were critical to moving the bill forward to adoption. The bill initially passed in 2016, and was expanded in 2018, thanks in large part to continued championing from Esgar.

In Georgia, lieutenant governor Geoff Duncan ran on a platform of making Georgia the "technology capital of the East Coast."<sup>14</sup> MAC's focus on expanding access to computer science fit neatly with Duncan's agenda. MAC's education staff members met regularly with Duncan throughout the process of developing the computer science legislation, and the support they received from Duncan was critical to the passage of the legislation.

## **To successfully leverage both collective and individual voices in their advocacy work, business advocacy organizations should:**

### **Cultivate relationships with key stakeholders.**

- Build broad coalitions that bring together as many organizations as possible on an issue. Bringing in the voices of unlikely bedfellows (such as business and labor or Republicans and Democrats) and elevating the voices of the beneficiaries of education policy (students and their families) can add a powerful element to advocacy.
- Know when the organization is best positioned to lead a coalition and be willing to step back when others are better positioned to take the helm.
- Cultivate individual legislative champions by investing in relationships with influential policymakers and ensuring they are engaged throughout the process of developing and advancing new legislation.

### **Develop a strategic approach for when to communicate with an individual or collective voice.**

- Be strategic in determining when the organization will use its leadership role to speak on behalf of the business community versus when it will call on individual CEOs or business leaders to call a legislator or testify on behalf of a piece of legislation.

### **Identify and build partnerships with legislative champions.**

- Work to understand the priorities and interests of policymakers and invest early in building relationships with them; it is especially important to cultivate relationships proactively, so that the organization has strong relationships in place when policy windows arise.

## Conclusion

Successful business advocacy organizations demonstrate strengths across a number of competencies: defining a clear value proposition to members, funders, and legislators; setting clear agendas that address statewide needs; creating strategic approaches to using human and financial capital; and using advocacy best practices. Leaders of these organizations have to be simultaneously strategic and agile, operating with a clear vision yet an ability to pivot as needed. They need to be deliberate in how they use and deploy their people and dollars, yet able to adjust as the landscape changes and new opportunities emerge.

We hope that the findings enumerated in this discussion offer insight into how business advocacy organizations have put these competencies to use, the varying contextual factors that inform their approaches, and the similarities and differences that emerge as a result. Of course, at the end of the day, successful business advocacy depends on the business community acknowledging the opportunity they have to help ensure schools serve students well, and that students are prepared to contribute to their local economy and community.

## Endnotes

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Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.

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