

**GROWING COMMUNITY INFRASTRUCTURE
FOR PUBLIC EDUCATION
IN DUVAL COUNTY, FLORIDA**

SPRING 2009



WHEN THE 2009-2010 school year starts in Jacksonville, Florida, the Duval County Public School system will have a new partner in its efforts to provide quality education to the district's 123,000 students: the Jacksonville Public Education Fund.

In many respects, the Jacksonville Public Education Fund is not remarkable. Like other public education funds in cities across the country, it serves as the community's advocate for quality public education. It takes the long view, providing stability across changes in administration or economic boom-and-bust. And it serves as the school system's "critical friend," offering tough, but constructive, advice when needed.

In other respects, however, the Jacksonville Public Education Fund is quite remarkable. It has come into being in less than 18 months, and today it has a \$3 million, five-year operating budget, and a growing staff. More importantly, perhaps, it has attracted a board of truly diverse community leaders and begun to galvanize disparate voices for quality education in a community where the public schools have a history of struggle.

The story of the emergence of the Jacksonville Public Education Fund is instructive, particularly for students of philanthropy. It demonstrates how a philanthropic organization, through strategic actions and moderate financial investment, can provide community leadership and move a community agenda, leaving lasting community assets behind.

IN 2003, THE COMMUNITY Foundation in Jacksonville was approaching its 40th birthday, and foundation leaders took that opportunity to reflect on the organization's accomplishments and refine its vision for the future. Through a year-long series of community conversations, the Foundation sought to identify both the *ways* it could add value to the community, and the *places* it could add value. It determined that its highest value-adding strategy was to “enhance the state of knowledge and practice” in the community around key issues. It also determined that public education was a critical field in which the Foundation could potentially make a contribution to the long-term welfare of the community.

Jacksonville and Duval County (the two governments are consolidated) comprise a sprawling community - 841 square miles - that is a mix of core urban, suburban and rural neighborhoods. Duval County Public Schools serves the entire area, operating more than 160 schools with a staff of more than 14,000 and more than 123,000 students, making it among the largest public school systems in the nation.

Like many large school systems, Duval County's has struggled to meet the needs of an increasingly diverse and often under-prepared student body. These challenges are exacerbated by the public-school funding environment in Florida, where there is no state income tax and a disproportionate number of voters are retirees with no perceived stake in the public school system. Since the late 1990s, the Florida Legislature has enacted \$20 billion in tax cuts and reduced general revenue to state government by 22%.¹ As a result, the State of Florida ranks 50th among the states and District of Columbia in spending on education as a proportion of personal income.²

By 2004, the results of state's standardized tests showed that more than half of the 3rd-through-10th graders in Duval County Public Schools were not performing at grade level in either math or reading.³ Moreover, the achievement gap between minority and majority students was notable, with minority students scoring significantly lower on the state achievement tests.

While there were a plethora of community organizations and programs offering to support the public schools, they lacked coordination and, often, good strategies. “Help is not always helpful,” as one observer stated, and some poor performing schools found themselves awash in well-intended, but competing and highly distracting community-based support efforts.

It was in this environment that the trustees of the Community Foundation decided, in early 2005, to focus a significant portion of the foundation's work and resources on public education - *for the next 10 years*.

“Education does not lend itself to a short-term view,” said Bill Scheu, chair of the Foundation at the time. “We were focused on stimulating others to be involved in the work, not doing it all ourselves. That stimulation had to be long lasting to be systemic and not symptomatic.”

THE QUALITY EDUCATION FOR ALL initiative was launched by The Community Foundation in mid-2005, with the Foundation's trustees pledging a 10-year investment of \$2 million - or \$200,000 a year.

"The goal is to achieve marked improvement in test scores, graduation rates, dropout rates and college readiness of all students over a 10-year period and to minimize the gap in performance between schools with high proportions of lower-income or minority students and those with high proportions of wealthier or majority students," stated the white paper prepared for the launch of the initiative. "A companion goal is to cultivate citizen demand for quality public education, build citizen understanding of and involvement in public education, and encourage parents to expect higher education for their children."⁴

In line with this latter goal, the Foundation identified Community Learning as one of the initiative's three primary strands of work, and Foundation staff set about establishing the Forum on Quality Education - a group of 27 community leaders who committed to come together one day a month for 18 months to educate themselves on the challenges and opportunities facing public education in Duval County.

About the time that Quality Education for All was unveiled, the Jacksonville Community Council Inc. (JCCI), a local think tank, released the results of a multi-year study on public education in Duval County. Among the major concerns highlighted was this:

*Jacksonville lacks an ongoing, structured dialogue in which citizen input and educational expertise can meet, without blame and defensiveness, to improve student performance.*⁵

As a solution, JCCI recommended convening "an action group to initiate and maintain a city-wide dialogue on education issues."⁶ The group to which JCCI looked to lead this convening was the Alliance for World Class Education.

The Alliance was the second generation of a local education fund that had been started in Jacksonville in the 1980s. In its first generation, the organization, known then as the Duval Public Educational Foundation, Inc., had focused its work chiefly on teacher recognition. In 2000, the organization restructured, moving to a board of influential business leaders and adopting the Alliance name. While it retained the teacher recognition program work, it refocused its efforts on providing support in non-instructional school operations and leadership development in the school system.

By 2004-2005, when JCCI made its recommendation and suggested the Alliance take a leadership role in the community conversations, the Alliance was committed to an agenda of project-oriented work around business processes. It did not see itself taking a leadership role in the community convening; it did not see its role as doing long-term work.

“The work of the Alliance had been deliberate and focused on leadership development, teacher recognition and improving business processes of the school district,” said Cheryl Grymes, then executive director of the Alliance. “It was a sound strategy that played to the organization’s strengths at the time.”

When The Community Foundation invited leaders of the Alliance board to participate in the Forum on Quality Education, they declined and appointed Grymes to represent the organization on the Forum. It proved to be a fortuitous decision.

THE FORUM ON QUALITY EDUCATION began meeting in October 2005.

The group was rich with diverse expertise. Among the members were:

- The chair of the Duval County School Board;

- The newly appointed Duval County School Superintendent and the associate superintendent;

- The president of the teachers union;

- The presidents of both the community college and the state four-year university located in Jacksonville;

- The presidents of United Way of Northeast Florida and the local Chamber of Commerce;

- Two past chairs of The Community Foundation;

- A family and juvenile court judge for the state judicial circuit;

- The director of the Jacksonville Children’s Commission;

- The school system’s 2005 teacher of the year;

- Three of the community’s leading philanthropists.

Each Forum member brought great strengths and knowledge to the table, and each assumed that he or she understood public education. In fact, their level of knowledge varied greatly, as did their perspectives and opinions.

The premise of the Forum was to build a common body of knowledge among a critical mass of community voices about the issues surrounding public education: trends in learning, trends in funding, concepts in public policy, community levers for change, and so forth.

In November 2005, guest speakers at the Forum were Jesse Register, then chief of the Hamilton County (Chattanooga) school district, and Wendy Puriefoy, president of the Public Education Network, a national network of community-based school reform organizations. Together, they told the story of Chattanooga’s successful efforts to improve its student test scores and strategies employed there and in other communities for building greater community engagement in public schools.

(In fact, the Chattanooga story was a familiar one to The Community Foundation. In 2004, as the Foundation was just beginning to focus on public education, Foundation executives and trustees had visited with Jack Murrah of Chattanooga’s Lyndhurst Foundation, which had been influential in many changes in that community, including changes in public

education. Murrah subsequently came to Jacksonville and met with a small group of Community Foundation trustees and donors, among them Tracey Westbrook and Dan Rice, who would become pivotal players later on.)

As the Forum participants began to learn more about the potential for community change, they also began to unpack the nuts and bolts of challenges facing Duval County public schools: the complexity of funding streams for the school district, the challenge of attracting and retaining high-quality teachers, the potentially volatile shifts in focus caused by political changes, and the fundamental challenges facing students and parents.

IN THE MIDST OF THESE DISCUSSIONS was the new Duval County School Superintendent, Joseph Wise, who had been hired from Wilmington, Delaware and began work in Jacksonville just as the Forum was launched. Wise was a lean, high-energy leader with the enthusiasm of a salesman and the passion of a revival preacher. For Wise, the Forum was more than a learning opportunity, it was a chance to build a network of community leaders with whom he could test ideas and strategies for change in the district.

But storms erupted early in Wise's tenure in Duval County. Within six months of his arrival, news reports surfaced in Wilmington suggesting he improperly managed the Delaware school district's finances, creating an opening for his Duval County detractors to raise questions about his performance. That controversy was followed by frequent flare-ups between Wise and select members of the Duval County School Board. These received prominent media attention.

While Wise offered many new ideas for school system change, his contributions often were overshadowed by his political gaffes. And while he worked diligently to build relationships with key stakeholders in the community, he did not always turn first to the "established" power structure represented by the Alliance leadership. Where his predecessors had used the Alliance board as something of a "kitchen cabinet," Wise's relationship with the Alliance was more distant and tentative.

The transition to the Wise administration was particularly instructive for the staff and trustees of The Community Foundation and those who were leading the Quality Education for *All* initiative. Superintendent Wise was a sharp contrast to his predecessor, who had been stern with a military-like demeanor and did not welcome community involvement in the school system. The shift in style and focus from one superintendent to another sharply demonstrated the challenge of maintaining programs and progress in a large school system in the midst of major leadership changes. With large urban school superintendent tenures running three to four years, or less, the potential for constant upheaval within the school system was staggering.

Moreover, Wise's frequent political missteps made clear the benefit of having a strong cohort of community leaders who could run interference, provide backup support and offer constructive criticism to the superintendent.

THROUGHOUT 2006 AND 2007, the members of the Forum of Quality Education explored a wide range of topics related to public education, but conversations repeatedly came back to a fundamental question: What entity in Duval County could be a neutral but informed advocate for quality education over the long term? Superintendents come and go, school board members come and go. Who provides the consistency, and demands the accountability? How does the community avoid falling victim to the "education trend of the year?" What organization or group of individuals accepts responsibility for maintaining a long-term view for the school system? Who mobilizes citizens to demand quality education?

The leaders of the Quality Education for *All* initiative and The Community Foundation president were meeting every six months with members of the executive committee of the Alliance and executive director Grymes to share the progress of the initiative. The question of long-term community leadership emerged in these conversations as well, and the Foundation leaders made clear that the Foundation was not interested in adopting public education as a core mission for the indefinite future.

That prompted the Alliance to contemplate its future role in the community. Staff and executive committee members worked to learn more about local education funds and how the Alliance might reconfigure itself to make a greater contribution in Duval County. They engaged a consultant and worked to create a new strategic plan, one that envisioned the Alliance as a stronger community advocate on behalf of quality public education.

At the same time, members of the Forum on Quality Education began to have heightened interest in establishing a new, high-performing local education fund in Duval County. From their early meeting with Wendy Puriefoy, and subsequent Forum sessions on other community strategies for creating change, the Forum members had embraced the value of an independent community entity that could hold knowledge and institutional memory, mobilize community stakeholders around critical issues, and be a consistent and sustaining presence during times of leadership change.

It soon became apparent that there were two paths Duval County could take to establish a high-performing local education fund:

- The Alliance for World Class Education could re-invent itself and become a high-performing local education fund;
- Or, The Community Foundation could help create one from the ground up.

Either path presented a host of challenges.

THE ALLIANCE COMPLETED its strategic plan in 2007 and, with the assistance of The Community Foundation, began the quiet task of approaching donors to financially support it as it evolved into a more robust and impactful organization. These appeals, however, met with some resistance. Delores Barr Weaver, Cindy Stein Edelman and Gary Chartrand each was approached by the Alliance - and each, independently, declined the opportunity to invest in the “new” organization.

These were three critical rejections for the Alliance. Weaver was an owner of Jacksonville’s NFL football team, chair of the team’s foundation, a leading community philanthropist, former trustee of The Community Foundation and a member of the Forum on Quality Education. Edelman, along with her husband, was a major community philanthropist, a trustee of The Community Foundation and the co-chair of the Quality Education for *All* initiative. Chartrand was a prominent Jacksonville businessman whose family had recently established the first private local foundation to focus exclusively on public education.

The three - along with other potential donors - had several concerns about the “new” Alliance. In particular, there were concerns about governance. The Alliance had expanded its board to enable greater diversity for the organization. However, a small executive committee remained, with significant power, creating confusion among some new board members about the real value of their votes.

Edelman and Chartrand were unaware that each had been approached by the Alliance until The Community Foundation brought them together for a breakfast meeting. As the conversation unfolded, they realized their common interests. They also realized that they needed to gain a deeper understanding of the potential role of local education funds - and they needed to bring others to the table to do the same.

With the help of The Community Foundation, Chartrand and Edelman invited Wendy Puriefoy to return to Jacksonville for a private meeting with a select group of stakeholders. In early 2008, Puriefoy met at Chartrand’s corporate headquarters with a group of about a dozen that included, in addition to Weaver and Edelman:

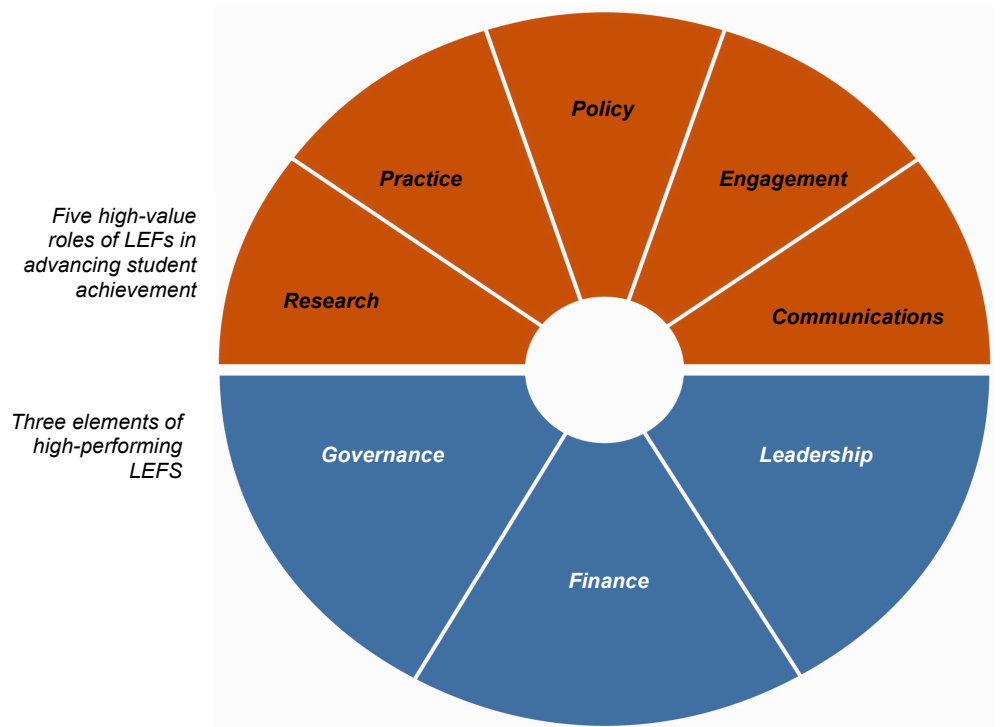
- Ann Baker, community philanthropist, member of the Forum, and former Community Foundation chair;
- Jim Van Vleck, co-chair of Quality Education for *All* and a member of the Forum;
- Tracey Westbrook, community philanthropist and Community Foundation trustee who had participated in the 2004 meeting with Lyndhurst Foundation’s Jack Murrah;
- Dan Rice, current Community Foundation chair who also had participated in the meeting with Murrah.
- And Cheryl Grymes, the executive director of the Alliance who had served as a member of the Forum.

As a group, these individuals had both knowledge and interest to improve public education in Duval County, and the financial wherewithal to make things happen. And

LOCAL EDUCATION FUND PERFORMANCE

The Public Education Network

	Start-Up	Moderate Capacity	High Capacity
Research & Data	--	+	+++
Focus on Achievement (Theory of Change)	--	+	+++
Community Engagement	--	+	+++
Focus on Non-Reform Activity	+	+	--
Local Funding	+	+	+++
National Funding	--	+	+++
Project Funding (modest grants for specific projects)	+	+	+



there was a heightened sense of urgency. In late 2007, after a series of high-profile run-ins with a school board member, Superintendent Wise left his position as superintendent.

Named as interim superintendent was Ed Pratt-Dannals, who had served the school system's administration for more than a decade, including serving as Associate Superintendent under Wise's tenure. Pratt-Dannals had been a member of the Forum on Quality Education and was viewed with favor by other Forum members. While his quiet, thoughtful demeanor was welcome, the transition was yet another upheaval for the school system and a further distraction from the task of public education reform.

WENDY PURIEFOY'S PRESENTATION to the small group at Chartrand's office was a turning point for two reasons.

First, the group gained a solid understanding of local education funds, and how high performing, or high-capacity, funds were different from the Alliance for World Class Education.

As defined by Puriefoy, a high-capacity local education fund provides a permanent, well-resourced, community-owned institution that engages a broad stakeholder group and ensures a sustained commitment to systemic public education reform. It advocates for accountability, improvement, involvement and resources for public schools. It works to build infrastructure, leadership, knowledge and momentum for innovation. It champions high-quality public education for all students through an independent voice that transcends changes in superintendents and in school boards.

A high-capacity local education fund fosters sustainable change because of its long-term commitment to the community and the school district, and its ability to facilitate outside investment in the school system.

Typically, though independent of the local school district, a high-capacity local education fund works closely with public school administrators, teachers, and boards. This relationship is complex, however, requiring *Push, Pull and Partnership*. At times, the local education fund's mission to improve student achievement requires that it push or pull the district in new directions, while continuing to maintain a constructive partnership.

The high-capacity local education fund also works with constituencies outside of the school district, such as the business and philanthropic communities, providing a vehicle through which these sectors can channel resources and expertise to the school district. And the local education fund focuses on engaging parents and other community groups in the work of the school district, often linking the resources and expertise of universities and social service agencies to the school district.

By contrast, the group noted, the Alliance was governed by an 18-member board, led by a five-member executive committee. Executive director Grymes was the sole employee. Annual revenues were roughly \$500,000 and assets about \$350,000, and funding came primarily from board member contributions.

Perhaps more significant, the meeting was a turning point in that the participants quickly coalesced into an unofficial task force dedicated to creating a high-performing local education fund for Duval County. By the time the meeting adjourned, Chartrand had been selected as the group's chair and several of those present had promised to financially support the effort.

Community Foundation staff then prepared a white paper that explained the concept of local education funds, the historic role that had been played by the Alliance for World Class Education and the rationale for creating a high-performing local education fund in Duval County. Within two weeks of the meeting with Wendy Puriefoy, the task force had garnered \$1.2 million in pledges for the new local education fund.

IN APRIL, COMMUNITY FOUNDATION president Nina Waters was invited to make a presentation to the Alliance board. The invitation came from board chair Preston Haskell and executive director Grymes.

Grymes had played an unusual and difficult role throughout the process. On the one hand, she was the sole staff person for the Alliance and committed to her task of running the organization and following the lead of the board. On the other hand, she was a long-time advocate for public education reform, a former member of the Duval County School Board and a member of the Forum on Quality Education. If her day-to-day allegiance was to the Alliance, her heart and soul belonged to public education. Grymes had participated in the meeting at Chartrand's office and knew how successful the task force had been in building support. She was well aware of the risks entailed in asking Waters to speak to the board, but she was willing to take that risk.

In her presentation, Waters shared the concepts of a high-performing local education fund, and went into detail on the critical roles that such a fund should play:

- Research: Developing and disseminating useful data to inform decision making.
- Practice: Developing deep understanding of best practices in reform.
- Policy: Advocating for a structural framework that enables successful schools.
- Engagement: Building constituencies in and out of school.
- Communications: Building community awareness and knowledge.

She went on to explain that there was a group of community leaders ready to invest significant resources to create such an organization for Jacksonville - and that those investors were not prepared to invest in the Alliance for World Class Education. If the Alliance wished to be involved in the new venture, it would require a reconstituted board of directors, a new governance model, a new brand, a new program structure and new

staff leadership. It was a difficult message to deliver, but Waters felt the time had come for complete candor.

THE ALLIANCE BOARD TOOK the matter under advisement.

As Grymes explains it, it was evident that the desire to move to a high-capacity local education fund was shared by the Alliance board members. But those same board members recognized the organization's limitations in terms of staff and funding. The Alliance leadership agreed to meet with the members of the task force to learn more.

In May, the task force reconvened at Chartrand's office with a number of new recruits and several important guests. Included were Preston Haskell, the Alliance chair, and Fred Schultz, a Jacksonville political lion, life-long advocate for public education reform, founder of the Schultz Center for Teaching and Leadership, and a member of the Alliance board.

For the new recruits, it was an opportunity to hear the pitch for a new local education fund. For those who had attended the first meeting, it was an opportunity to review progress. And for those who constituted the "task force," it was an opportunity to restate for Haskell and Schultz the offer that was on the table: The Alliance would contribute its 501 (c) (3) entity and its resources, but the organization would be renamed and rebuilt from the ground up. A few Alliance board members would remain, but the majority would leave the organization.

After several days and much soul-searching, the Alliance leadership agreed to join members of the task force on a Steering Committee to oversee the transition to the new organization, which would be structured as a high-capacity local education fund. The Alliance board formally approved the transition plan in June and the transition plan was announced publicly in July.

With agreements reached, every donor but one came in with their pledges, resulting in a start-up pool of funding for the restructured organization. The Community Foundation trustees contributed \$250,000 to the effort.

In November, the leadership of the Alliance joined the new leadership of the Jacksonville Public Education Fund for an evening of celebration and recognition. Grymes told those assembled,

"Through this transition, the work of the past provides the foundation for the future. Thanks to the relentless efforts of many, the Jacksonville Public Education Fund now exists. I am proud of what we have accomplished and I am excited about the future of public education in Duval County."

TO LEARN MORE

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ENDNOTES

¹ Duval County Public Schools, presentation by Superintendent Ed Pratt-Dannals January 2009.

² Annual Survey of local Government Finances, U.S. Census Bureau, 2005-2006.

³ Public Education Reform - Eliminating the Achievement Gap, Jacksonville Community Council Inc., Summer 2004

⁴ Quality Education for All: Paving a Path to Economic Opportunity and Prosperity. The Community Foundation, 2005.

⁵ Ibid.

⁶ Ibid.