LEARNING PAPER

Five Year Reflection: The Bush Approach

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Investing in great ideas and the people who power them is the Bush Foundation's tagline. It is also our strategy.

It is simple and intuitive to say that ideas are nothing without people to power them. We believe there is a much bigger, strategic truth hidden in that statement. Change happens by people, for people. Most philanthropic interventions involve a bunch of people working to make change with or through a bunch of other people — like funding an education organization to convince district officials to direct principals to coach teachers to engage with students in some new way. It is a chain of human interactions that requires the right motivation, capacities, and coordination at every link.

When I study what I consider as the highest-impact philanthropy, it has explicitly and fundamentally focused on people. It has been structured to inspire, equip and connect the people needed to make some change. Conversely, when I study philanthropic failures, it is fairly apparent where things broke down. There is usually a telltale weak link — at least one group of people involved that was inadequately inspired, equipped or connected to do their part.

This sounds simple. But it is so simple, so basic that it I think we are missing it much of the time. In our efforts to be strategic in philanthropy, we often tend toward the systemic in a way that abstracts.

I have been both an eager participant and facilitator in many meetings in which we have “mapped the landscape” and “identified gaps and overlaps” in systems. I now see that, in nearly every case, this kind of mapping exercise led us to a system view and a system intervention that may or may not make the right difference for the human being who is actually trying to navigate or change the institutions or forces represented by our boxes and arrows.

I absolutely believe system change is the goal, and I’m not advocating for thinking small. I’m advocating for thinking human. This means changing how we think about strategy. Since what makes philanthropy hard is inspiring, equipping and connecting people, that’s where strategy should start.

We talk about the importance of people in many different ways in philanthropy, and to be clear, I’m not talking about capacity building to advance your strategy, although that is super important, and we do that, too. I’m not talking about community engagement to inform your strategy, although that is also super important and we do that as well. I’m not talking about using human-centered design methodology although we are quite interested in that, and it complements this approach nicely. Finally, I’m not making a revolutionary “power to the people” argument, though the lessons could be applied toward that end. Rather, I’m making a very pragmatic “the only way to power anything is people” argument.

THE BUSH APPROACH

Simply put, we believe the only way good things happen is through people. That’s really all we have. We believe, therefore, that the way to make any good thing happen is to inspire, equip and connect people to do it.

That is the heart of our philanthropic approach.

We frame our work with four questions:

What is the goal?
Who is required for success?
What do those people need to be inspired, equipped and connected for success?
What ecosystem conditions are required for their success?
Let's break it down.

1. What is the goal?

You must know what you are trying to accomplish. What change do you want to see in the world? We call these "guiding goals" and make sure they are big enough to reflect change in a system's overall capacity, not just a specific outcome. If the goal is too narrowly construed, you run a greater risk of causing harm in the ecosystems supporting that goal — in other words, you risk reaching a goal at the expense of other important goals and relationships in the ecosystem. And, of course, the more our goal setting is inclusive of and informed by all those impacted by an issue, the more possible and more powerful our goals will be.

2. Who is required for success?

Next, you must identify the people or likely groups of people who are required to make that change happen. This requires breaking the mindset of "institutions and systems" and recognizing that institutions and systems are just people. Who are the people that can spark and drive the change through institutions, through systems, in whatever ways that change needs to occur? Who are the people that are required to do something different? If it is changing the healthcare "system," for example, we are really talking about patients, nurses, doctors, administrators, insurance company leaders, and on and on. The "system" doesn't change unless the behaviors of the people who make up that system change.

3. What do they need to be inspired, equipped and connected for success?

Once you've identified the people involved, the next step is to figure out for each group (1) What will motivate them? (2) What skills and supports do they need? (3) To whom do they need to be connected to make the change happen at the intended scale?

We use a matrix that has a row for all of the key groups of people and then three columns: inspire, equip and connect. We then try to fill in each box with answers to the questions above. If we do it right, the matrix identifies everything that must be in place for the change to occur.

With this analysis, we can then decide where to start. What interventions are likely to make the greatest impact? The hope is to find the most efficient way to make the change with minimum viable intervention. To do that we must know:

- **Which groups of people are critical to success?**
  For example, if the intervention requires trained police officers, engaged community leaders and supportive parents, and we don't engage the parents, it is not going to work.
- **What type and dosage of intervention is required?**
  If the police officers need training, equipment, and at least 10 dedicated hours per week to do the intervention, and we give them training and equipment but only two hours of dedicated time, it is not going to work.
- **What's the right pace and sequencing?**
  If our intervention requires 100 trained police officers, and there are only 50 trained police officers, we can't go any faster than it takes to train 50 additional officers.

Doing this analysis is hard. It bends my brain, and it is much more granular than my McKinsey-formed strategic instincts. It makes me realize how often we casually develop strategy in philanthropy, and how prone we are to wishful thinking. For example, if we could just do this one cool thing we are excited about — like give every kid an iPad — the other stuff will just happen. This

analysis forces us to be realistic about what is actually required to make the difference we want to make.

4. What ecosystem conditions are required for their success?

Once you've figured out how you will inspire, equip and connect the people to power the change, you have to understand the conditions in which they are operating. What ecosystem changes are required for them to be successful?

There is no line between the people and the ecosystem. They directly affect each other. Any action taken to support people in the ecosystem will actually change the ecosystem. We call the ecosystem analysis out as a separate part of the approach because we think an ecosystem mindset is so important.

An ecosystem mindset is essential for appreciating and managing the dynamics of change — for understanding the disruptions (good and bad, intentional and unintentional) that we are causing with our interventions to figure out the next move. This mindset is essential for creating the conditions in which our efforts, and the related efforts of others, can be successful. And finally, it is essential to ensure that whatever we do — even if we are wrong and fail — will enrich and not deplete the ecosystem.

For every initiative and program area, we have a strategy for building the health and strength of the supporting ecosystem, including providing operating support to key institutions through "ecosystem grants."

CONCLUSION

So that's how we do our work. There's more to how we employ this approach that we believe is equally important to doing it well, such as being inclusive and humble, and learning and adjusting our strategy continuously.

In our view, the power of this approach is in its simplicity, but simple does not mean easy. Part of the reason we are betting on this approach is because we

believe that what makes it hard is what will make it successful. This approach reflects how change actually happens. It forces realism about what is required and how long it will take. And, most importantly, it builds capacity toward change rather than imposing change. In these ways, it is a highly adaptable approach toward impact that is more likely to be sustained.

CASE STUDY: EDUCATION

We are approaching the end of year one of a new education strategy. Here is how we used our framework to develop our strategy:

1. What is the goal?

Our goal is to make our region the national leader in individualizing education to meet the needs and ambitions of all students.*

This is a big goal, which we like. Reaching the goal requires a cultural shift, inside and outside of the education system. It requires significant rethinking and redesigning of schools, changing the expectations people have of schools and building demand to make change. It is not a goal that can be simply mandated or a goal that can be gamed with short-term intervention. It is a goal that requires building the capacity of the system toward a particular end.

2. Who are the people required for success?

We believe that doing individualized learning well — like any educational model — is largely a function of school culture. Neither decrees from on high nor classroom-level innovation are enough to spur the degree of culture change required within individual schools. There are many people required to power this goal through school level change. We identified seven as the most critical groups: students, parents, teachers, school leaders, district leaders, state-level leaders and funders.

3. What do those people need to be inspired, equipped and connected for success?

We did our “inspire, equip, and connect” matrix analysis on each of the seven priority groups. Given the state of our ecosystem, we realized that there were simply not enough supports in place for a massive number of schools to change simultaneously. We can’t go any faster than can be accommodated by the capacity of the change support system we have in place. We also recognized that in our region we had a group of schools already doing individualized learning, a group of schools who were fired up to start doing individualized learning, and much larger group of schools who were not yet ready to try individualized learning. Therefore, we decided that we could best create a movement toward individualized learning by providing the right kind of encouragement and supports for the people involved in each category, in a way that encourages those people to move their schools toward individualized learning, at a pace that can be supported by the ecosystem.

We launched with a three-pronged strategy: (1) bring educators from schools already doing individualized learning into a shared support network. We believe building the right supports for these educators — based on their self-identified needs — is our best-odds strategy for effectively building supportive infrastructure for other educators; (2) provide technical assistance, planning support and implementation funding to educators who are ready to try new individualized learning. We partnered with a national expert to create a learning cohort experience for schools in our region; and (3) build understanding of and demand for individualized learning across all seven critical groups. This has included events, outreach to key education stakeholders, and taking a group of “learning leaders” to visit school models outside our region. We are intentional in engaging key influencers that can help us to inspire, equip and connect all seven of our priority groups of people.

4. What ecosystem conditions are required for their success?

Our analysis of the ecosystem conditions required for success has been based in large part on what we hear from practitioners in the region about what has been hard and helpful for them. We have also learned from the experience of other regions and from national intermediaries that have been working on individualized learning for far longer than we have. Our first focus within the ecosystem is on building and importing more technical assistance and change management support so that schools interested in individualized learning have what they need to do it well. We are planning to expand our focus in the next year to work on policy and regulatory barriers and on developing more relevant student and school success measures.

** We define individualizing education as making education more relevant to all students in terms of how they learn (instructional relevance), who they are (cultural relevance) and what they aspire to do (career relevance).*

BONUS: PHILANTHROPY'S GREATEST HITS

Our Bush Approach was inspired and informed by analyzing the strategies behind some of philanthropy's greatest hits. There's plenty of room to disagree on the motivations and goals of these initiatives, but each truly had extraordinary impact on the world not by imposing change, but by fomenting change. They were smart about identifying the right people to power their idea and then inspiring, equipping and connecting those people. I consider them all models of extraordinary philanthropy, and they have influenced me a great deal.

Collapse All

The Rockefeller Foundation and the Green Revolution

At the request of the Mexican government, the Rockefeller Foundation launched an initiative in the 1940s to help Mexico produce enough food for its people. They invested in research — like figuring out the best crop variations and fertilization practices. Then they inspired, equipped and connected two primary groups of

people needed for sustainable change: farmers and local agricultural experts. They taught farmers about advances in agricultural science and convinced them to try new techniques and crops. To build the needed corps of agriculture professionals, they supported hundreds of Mexican students to train in relevant professions. The effects were dramatic: In short order, per acre yields of wheat quadrupled and Mexico became a net exporter of food. Demand from other countries led the Rockefeller Foundation (and others) to expand the work throughout Latin America and Asia. While there are critics of the environmental impacts of the Green Revolution, it is credited with saving over 1 billion lives around the world.

The Julius Rosenwald Fund and its school building program

Julius Rosenwald, with counsel from Booker T. Washington, decided that the best way he could help black Americans was to build the will and infrastructure for education for black students in the rural south. Rosenwald offered rural communities matching dollars to construct school houses for black children. The objective was not just to build schools, but to change the expectations people had for how black Americans should be educated. To do that, Rosenwald focused on building the ambitions and capacity for educating black Americans among two groups of people: local education officials and local black communities. Tactics included funding half the salary of black men to work as assistants to the state agents for black schools and, with each school project, including dedicated funds for organizers to help black community leaders make the case for the school and convince the community it was possible. When the program ended in 1932, the Fund was responsible for the construction of 4,977 schools — at least one in every county with a significant black population in the south. At that time, 40 percent of black students enrolled in schools in the south (and 27 percent of all black students in the United States) attended Rosenwald schools.

The John Olin Foundation and the Law and Economics Movement

In 1975, the John Olin Foundation set its sights on “the revitalization and survival of the free enterprise system.” The Foundation recognized that lawyers played important public roles of many kinds, and they were central to most policy-making functions. They focused their efforts, therefore, on inspiring, equipping and connecting lawyers to advance free market principles. The heart of their strategy was influencing how lawyers were trained and tactics included creating Law and Economics departments within law schools, providing financial support for law school faculty, and creating a professional association and publication to create opportunities for faculty. They also worked to directly influence the world view of law students through providing fellowships, holding events and providing networking opportunities. The Olin Foundation, in coordination with a handful of other conservative foundations, is widely credited with having a truly transformative impact on American politics and policy. One of the most significant markers of their success is the Federalist Society. With an investment of $2 million over two decades, the Foundation helped to create an institution that now has tens of thousands of active and influential members and connections to four of the nine members of the U.S. Supreme Court.

The Lasker Foundation and medical research funding

Established in 1942, the Lasker Foundation was founded by Mary and Albert Lasker “to encourage federal financial support for biomedical research in the United States,” particularly related to cancer. To do this, they needed policy makers to think differently about the role of the federal government. The Laskers had the influence to advocate directly to policy makers — across party lines — with great success. They understood, however, that policy makers are influenced by others, so they worked to enlist journalists, creating an awards program for medical journalism that, in short order, resulted in regular health and medicine columns in over 40 leading newspapers. They elevated medical researchers through the prestigious Lasker Medical Research Awards. And they activated the American public through pioneering tactics like placing articles in Reader’s Digest, asking celebrities like Bob Hope to talk about cancer, having a

cancer story line written into the popular radio show “Fibber McGee and Molly,” and convincing Ann Landers to ask her readers to contact their legislators. Three years after the Laskers began their initiative, the annual budget for the National Institute of Health increased from $2 million to $30 million. Today, that NIH budget is $30 billion. In the book Great Philanthropic Mistakes, which is critical of the aims of Mary Lasker’s work, the author says she “did as much as one person can do to expand the size and scope of the federal government.”