

# More than Patrons: How Foundations Fuel Policy Change and Backlash

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With the adoption of No Child Left Behind (NCLB) in 2001, bipartisan support for enhancing the federal role in educational policy appeared to reach a high-water mark. More than a decade of legislative stagnation on K–12 educational policy followed the passage of NCLB until the adoption of the Every Student Succeeds Act in 2015, which curtails the federal government's role in education. Despite limited congressional action and weakening political support for federal involvement in education, major educational policy has been developed and implemented on a broad national scale during the past decade, including Common Core State Standards, new teacher-evaluation systems, and widespread charter-school expansion. These policies involved new federal grant programs, adoption of new state policies, and local-district implementation. Many of the key champions of these policies were philanthropic foundations.

An array of private funders supported organizations that promoted Common Core, including the Gates Foundation, Broad Foundation, and Carnegie Corporation. Teacher-evaluation reforms also developed with significant philanthropic investments, including the Gates Foundation's Measures of Effective Teaching Project. Forty-nine states and the District of Columbia have made significant changes to their methods for evaluating teachers since 2009. In addition to these accountability policies, philanthropists supported the rapid growth of the charter-school sector. Charter schools are the core policy focus of the Walton Family Foundation, but they also draw support from many other major funders, including the Gates Foundation, Dell Foundation, and Broad Foundation.

Political scientists have traditionally characterized philanthropists as patrons, emphasizing their background role relative to the interests of advocacy leaders who take public positions and lobby lawmakers. Based on recent developments in educational policy, I argue that foundations have stepped well beyond the role of patrons. Philanthropic funding for K–12 education has grown substantially in recent years: inflation-adjusted grant dollars from major educational funders grew by 73% from 2000 to 2010 (Reckhow and Snyder 2014). Rather than simply funding research or supporting educational programming, a growing share of these grants support national policy advocacy. Foundations are involved throughout the policy process: formulating new policy ideas, building networks of advocacy groups to promote policy change, and infiltrating bureaucracies to support and guide policy implementation. Using an original dataset of philanthropic grants and analysis

of congressional hearings, I show how foundations have attempted to coordinate and lead social-policy change from the top for Common Core and teacher quality.

Based on recent political developments, I contend that there have been costs to this more expansive role for philanthropy. The longevity of Common Core and teacher-quality reforms in some states may be challenged because a substantial backlash has formed among state legislators, teachers unions, and Republican presidential candidates. This could result in costly policy churn for states that invested in new standards, tests, and evaluation systems, while foundations shift to new areas of funding. In contrast, foundation support for charter schools has been more akin to a patronage role; philanthropists have funded the emergence of new interests accompanied by a public constituency (Greene 2015). The continuing growth of charter schools and charter-school advocacy suggests that philanthropists have fueled more sustainable and lasting change in this sector.

## BEYOND PATRONAGE: NEW PATHWAYS FOR PHILANTHROPIC INFLUENCE

Political scientists often conceptualized the role of philanthropy in politics as a patronage relationship to civil-society organizations (Lowry 1999; Nownes 1995; Walker 1983). Foundations can provide resources to groups that might not otherwise have the capacity to organize politically, or they may focus support on organizations aligned with the foundation's programmatic goals. In particular, Walker (1983) highlighted the importance of patrons for citizen groups—that is, interest groups not associated with business or an occupational category—which often have the most difficulty in attracting resources.

The emphasis on patronage places philanthropists on the outskirts of the political arena—rarely playing a leading role or claiming public visibility. The foundation provides resources—and may expect to see specific goals achieved with those resources—but the recipient organizations are the actively engaged partners, speaking on behalf of constituencies and promoting new agendas. Although the patronage perspective may account for foundation behavior in the past and for some of the ongoing activities of foundations in supporting civil society, the concept of patronage fails to capture new approaches to political involvement among major educational foundations.

First, philanthropists involved in education are increasingly willing to engage directly with politics, voicing support for particular political leaders and specific policy proposals (Hess 2005; Reckhow 2013; Tompkins-Stange 2013). In some cases, it is not only the foundation taking a more visible

leadership role but also the foundation's benefactor. A living philanthropist can take public positions on policy in ways that extend the work of the foundation as an institution. For example, in 2010, Bill Gates delivered keynote speeches at the National Charter Schools Conference, the American Federation of Teachers Convention, and the Council of Chief State School Officers Annual Policy Forum. He proclaimed his support for specific policies, including merit pay for teachers and replicating charter schools through charter-management organizations. The prominence of living philanthropists is a new and distinguishing feature of educational philanthropy in the 21st century (Snyder 2015). This was most recently exemplified by 31-year-old Mark Zuckerberg's pledge with his wife, Priscilla Chan, to donate 99% of their wealth during their lifetime. Zuckerberg and Chan join several prominent living philanthropists who are involved in education and highly

and federal spending is only about 12% of educational funding. To implement the accountability reforms of NCLB, federal-policy entrepreneurs "borrowed strength" from the states, which had already developed some of the infrastructure for standards and testing (Manna 2006). Under the Obama administration, officials have borrowed strength from the philanthropic sector, which provided key staff to lead new federal programs and fund program development.

#### LEADING FROM THE TOP

The policy agenda of foundations can be quantified and analyzed by examining foundation grants. I compiled all K–12 educational grants from the top 15 educational funders for 2000, 2005, and 2010 (Reckhow 2013; Reckhow and Snyder 2014).<sup>1</sup> First, I show how foundations fund national-advocacy grants and the specific policy issues supported by them. Second,

### *Using an original dataset of philanthropic grants and analysis of congressional hearings, I show how foundations have attempted to coordinate and lead social-policy change from the top for Common Core and teacher quality.*

engaged in directing their grant-making activities, including Eli and Edythe Broad, Julian Robertson, John and Laura Arnold, and the Walton Family.

Second, top educational funders have coordinated their efforts by supporting aligned issue agendas, research programs, and advocacy efforts, and by linking organizations engaged in related policy efforts. As Teles (2008, 20) argued, "effective patrons need to share with the groups they fund an underlying strategic vision...they must also be embedded in a common network with their objects of support." To advance a major systemic reform, such as Common Core, foundations supported coordination and meetings among state leaders, research, and development to craft standards, advocacy at the state and federal level to promote the standards, and pilot testing of assessments linked to Common Core (McDonnell and Weatherford 2013). Further evidence of coordination appears in the distribution of grant dollars; overlapping grant-making by major educational foundations has increased substantially. In 2000, 23% of grant dollars from major educational foundations were given to organizations that received a grant from more than one major foundation. In 2010, 64% of grant dollars were given to organizations that received a grant from more than one major educational foundation (Reckhow and Snyder 2014).

Third, philanthropic coordination with the public sector also has grown much deeper, particularly with the US Department of Education under the Obama administration. This form of public-private partnership helped educational-policy entrepreneurs overcome a key obstacle to educational-policy change: the federal government's limited power and capacity in the face of a highly decentralized system of education (Cohen and Moffitt 2010). The US Department of Education is the smallest cabinet-level agency in the federal government,

I focus on a single major issue—teacher quality—to assess the extent of grantee participation in federal-policy debates and the amount of support from major foundations for these grantees.

From 2000 to 2010, major educational foundations expanded their support for national-level policy advocacy and research. In 2000, the top 15 educational foundations gave \$56 million (adjusted for 2010 dollars) to support organizations that convened, contacted, or informed policy makers on a national scale. By 2010, that amount increased to \$110 million. In contrast, local advocacy nonprofit funding dropped by 59% from 2000 to 2010 (adjusted for inflation). Yet, the shift toward the federal level was not uniform across issue areas. Table 1 summarizes the focus of national-advocacy grants in 2010 for the top three issue areas supported by philanthropists—that is, charter schools, standards, and teacher quality—including major grantee organizations associated with each issue and foundations that provided support. These three issue areas account for more than half of the total amount of national-advocacy grant dollars awarded in 2010. The grantees are grouped based on the issue area.

Standards were the largest issue category among the advocacy grants, receiving \$26.3 million in funds. These grants are overwhelmingly linked to advocacy for Common Core. There is particularly strong alignment across multiple foundations to support Common Core development and advocacy. For example, Carnegie, Gates, and Hewlett all funded the Council of Chief State School Officers to support the development of tests aligned with Common Core. Broad, Carnegie, and Gates each provided grants to the James B. Hunt Institute to support Common Core advocacy involving state leaders.

On the issue of teacher quality, educational advocacy groups, think tanks, and teachers unions all received major foundation grants, which totaled \$23.9 million. Many of the grants are

Table 1

## National Advocacy Funding by Issue Area, 2010

| Issue and Amount       | Selected Grantees                                  | Funders       |
|------------------------|--|---------------|
|                        | Educational Advocacy Groups                        | Broad         |
| <b>Standards</b>       | Achieve, Inc.                                      | Carnegie      |
|                        | Alliance for Excellent Education                   | Gates         |
| <b>\$26.3 million</b>  | Think Tanks  | GE            |
|                        | Research for Action                                | Hewlett       |
|                        | Thomas B. Fordham Institute                        |               |
|                        | Civil Rights Organizations                         |               |
|                        | League of United Latin American Citizens Institute |               |
|                        | National Urban League                              |               |
|                        | State/Local Government                             |               |
|                        | Council of Chief State School Officers             |               |
|                        | National Governors Association                     |               |
|                        | James B. Hunt Institute                            |               |
|                        | Educational Advocacy Groups                        | Broad         |
| <b>Teacher Quality</b> | Stand for Children                                 | Carnegie      |
|                        | The New Teacher Project                            | Dell          |
| <b>\$23.9 million</b>  | Unions   | Gates         |
|                        | American Federation of Teachers                    | GE            |
|                        | National Education Association                     | Hewlett       |
|                        | Think Tanks  | Robertson     |
|                        | Brookings Institution                              | Walton Family |
|                        | Center for American Progress                       |               |
|                        | Educational Advocacy Groups                        | Daniels       |
| <b>Charter Schools</b> | Alliance for School Choice                         | Carnegie      |
|                        | Foundation for Educational Choice                  | Gates         |
| <b>\$10 million</b>    | National Alliance for Public Charter Schools       | Robertson     |
|                        |  | Walton Family |

targeted toward reform of evaluation systems—including some to teachers unions. For example, Gates provided \$1.6 million to the American Federation of Teachers to “create and

*In 2000, the top 15 educational foundations gave \$56 million (adjusted for 2010 dollars) to support organizations that convened, contacted, or informed policy makers on a national scale.*

implement a comprehensive development and evaluation system.” Grants to think tanks, including Brookings and the Center for American Progress, are focused on research concerning teacher-evaluation systems.

In contrast, foundations spent comparatively little on national advocacy related to charter schools—only \$10 million. Instead, foundations gave more than \$128 million in 2010 to individual charter schools and charter-management organizations to open, expand, build, and operate schools. Foundations are not simply traditional patrons in the realm of charter schools. Most notable, foundations supported and legitimized charter-management organizations as a new strategy that would facilitate more rapid charter-school growth (Quinn, Tompkins-Stange, and Meyerson 2014). This role for foundations resembles the strategic-patronage approach outlined by Teles (2008), with foundations enabling shared goals and coordination among grantees. Some argue that funding for charter schools has a key advantage for foundations—it is more likely to be self-perpetuating (Greene 2015). By directly serving students and families that choose charter schools, a supportive constituency has emerged that will lobby for public resources to maintain them.

Meanwhile, regarding the issues of standards and teacher quality, foundations have moved toward supporting national advocacy, particularly during Obama’s presidency. To explore whether educational foundations have moved toward a more coordinated and strategic approach to advocacy, I analyzed congressional testimony focused on the issue of teacher quality. I used ProQuest Congressional to identify 96 congressional hearings with substantive content on teacher quality. Table 2 lists the organizations represented most frequently in teacher-quality hearings. Overall, foundations increased advocacy-grant funding to groups that gave frequent testimony—defined as three or more appearances before Congress from 2000 to 2012. Advocacy-grant dollars to these groups increased more than fivefold from 2005 to 2010—well above the overall growth in philanthropic funding for national advocacy groups involved in educational policy. Representatives from the Gates Foundation also testified three times on teacher quality.

In some cases, philanthropists funneled money to relatively new organizations, which subsequently gained visibility and prominence. For example, The New Teacher Project released “The Widget Effect” report in 2009 that supported a major overhaul of teacher evaluation; since 2009, the Gates Foundation has committed \$13.5 million in grants to The New Teacher Project. Representatives from The New Teacher Project testified before Congress in 2009, 2010, and 2012. In other cases, foundations supported groups that already were well-known purveyors of policy ideas. For example, the president of the Center for American Progress (i.e., a left-of-center think tank),

John Podesta, testified twice in 2007 in support of linking teacher compensation to evaluation systems. The Broad Foundation began funding the Center for American Progress in 2007 and has since continuously supported it with almost

Table 2

Most Frequent Witnesses Representing Organizations on Teacher Quality, 2000–2012

| Witness Affiliation                    | Witness Appearances | Advocacy Grant \$ in 2005 <sup>3</sup> | Advocacy Grant \$ in 2010 | Supports Evaluation Reform |
|--|---------------------|--|---------------------------|----------------------------|
| Council of Chief State School Officers | 7                   | \$3.1 million                          | \$4.3 million             | ¶                          |
| Education Trust                        | 7                   | \$1.2 million                          | \$7.9 million             | ¶                          |
| National Education Association         | 6                   | \$0                                    | \$538,000                 |                            |
| Education Leaders Council              | 5                   | \$0                                    | \$0                       | ¶                          |
| American Federation of Teachers        | 3                   | \$0                                    | \$2.4 million             | ¶                          |
| American School Counselor Association  | 3                   | \$0                                    | \$0                       |                            |
| Bill & Melinda Gates Foundation        | 3                   | N/A                                    | N/A                       | ¶                          |
| Business Roundtable                    | 3                   | \$0                                    | \$0                       | ¶                          |
| Center on Education Policy             | 3                   | \$535,000                              | \$750,000                 |                            |
| Center for American Progress           | 3                   | \$0                                    | \$957,000                 | ¶                          |
| Milken Family Foundation               | 3                   | \$0                                    | \$0                       | ¶                          |
| The New Teacher Project                | 3                   | \$130,000                              | \$9 million               | ¶                          |
| <b>Total</b>                           | <b>49</b>           | <b>\$4.96 million</b>                  | <b>\$25.8 million</b>     |                            |

\$1 million in grants, including three grants focused on teacher incentives or pay for performance.<sup>2</sup>

Additionally, based on content analysis of witness statements, the majority of witnesses representing these organizations supported teacher-evaluation reforms. The coding of statements included the following specific types of reform to teacher evaluation: (1) pay for performance; (2) evaluations that incorporate student test scores; and (3) evaluation systems that hold teachers accountable. Witnesses who made statements in agreement with any of these aspects of teacher evaluation were coded as supportive of evaluation reform. A noteworthy example of a supportive statement is testimony provided by Cynthia Brown of the Center for American Progress (*Education Reforms* 2012), who cited work by the Gates Foundation to support her position:

Groundbreaking work by the Gates Foundation’s Measures of Effective Teaching Project...has shown how observations and feedback can accurately identify quality teaching and can be used alongside measures of student learning. We as a nation must shift the conversation toward measuring, rewarding, and improving teacher effectiveness.

Based on congressional testimony alone, there appears to be remarkable consensus that evaluating teachers and offering merit pay are the best approaches to improving teacher quality. As one Gates informant, quoted by Tompkins-Stange (2013, 185), self-critically observed: “We have this enormous power to sway the public conversations about things like effective teaching or standards and mobilizing lots of resources in their favor without real robust debate.” In other words, whereas major educational foundations supported and amplified groups allied with their position at the federal level, the narrow conversation in Congress was isolated from simmering concerns among many

educators about using standardized tests to uniformly evaluate teacher performance.

FEDERAL PARTNERSHIPS

In addition to significant political involvement and coordinated support for issue advocacy, educational funders became more closely engaged with policy makers in the US Department of Education. The relationship between philanthropy and the federal government is reminiscent of the Ford Foundation’s Gray Areas programs of the 1960s, which inspired the War on Poverty. Yet, the extent of philanthropic involvement in education during the Obama administration is more substantial; as a historian quoted by Tompkins-Stange (Forthcoming, 116) commented, “Gates is strong-arming public policy in a way that the Ford Foundation never would have thought of doing.” A major aspect of the philanthropic–federal government partnership is the appointment of numerous US Department of Education officials who were either former Gates Foundation employees or former leaders of organizations that received substantial philanthropic support (McNeil and Sawchuk 2013). Three US Department of Education officials came directly from positions at the Gates Foundation: Jim Shelton (Deputy Secretary), Margot Rogers (Chief of Staff), and Carmel Martin (Assistant Secretary). Four other department officials previously led educational organizations that received high levels of grant support from Gates and other major foundations: Ted Mitchell (Under Secretary), Jon Schnur (Adviser to President Obama and Secretary Duncan), Joanne Weiss (Chief of Staff), and Judy Wurtzel (Deputy Assistant Secretary).

Foundations also played a role in supporting the implementation of major federal programs. A signature initiative of the Obama administration was the Race to the Top Program (RTTT)—a competition among states for funds

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provided by the American Recovery and Reinvestment Act. These funds were intended to support state initiatives involving four key priorities: adopting “college- and career-ready” standards and assessments; building data systems to measure student growth and linking student data to teacher effectiveness; recruiting and rewarding effective teachers and principals; and turning around the lowest-performing schools. By design, this competitive grant program required states to find the capacity to develop strong applications that were closely aligned with the US Department of Education’s policy objectives. Major foundations played a key

educational goals and expanding the role of the federal government. Without the federal government in an explicit organizing role, foundations filled a critical gap in providing resources and coordination.

#### DISCUSSION AND IMPLICATIONS

Although philanthropy is commonly viewed as a charitable activity, major foundations in education engage in many political activities. Coordinated, policy-focused, and politically engaged philanthropy also provides an important pathway for political influence among wealthy individuals,

*In 2010, six major foundations (i.e., Gates, Kellogg, Broad, Daniels, Irvine, and Hewlett) provided grants directly aligned with supporting state applications for RTTT funds as well as implementation of the program.*

role in supplying the necessary capacity to states. In 2010, six major foundations (i.e., Gates, Kellogg, Broad, Daniels, Irvine, and Hewlett) provided grants directly aligned with supporting state applications for RTTT funds as well as implementation of the program. For example, Gates and Broad both provided grants to support Louisiana’s RTTT application; Colorado received funding from the Daniels Foundation; and Hewlett, Daniels, and Broad supported California’s application. Ultimately, the Gates Foundation played the largest role in supporting state applications, by funding consultants to help 24 states prepare their applications.

In addition to the grant funding to build the capacity of states applying to RTTT, philanthropists supported the development of major policy objectives advanced through this program. Most significant, a key criterion for evaluating RTTT applications was state adoption of “college- and career-ready” standards. This requirement was widely interpreted as adoption of Common Core (an understanding that was likely further advanced by the Gates Foundation’s requirements for consulting support). The adoption of Common Core accelerated rapidly after the announcement of RTTT; 19 states signed on in June 2009, when Secretary Duncan made a series of policy speeches describing RTTT. Yet, the existence of Common Core as a policy that emerged from state-level cooperation—rather than the federal government—was dependent on the resources and networking provided by philanthropists. In addition to the widely distributed grant dollars, the Gates Foundation provided critical networking support across the grantees: “The foundations, especially Gates, have also been a primary motivator in the groups’ efforts to stay in contact, share resources, and in some cases, collaborate on joint projects” (McDonnell and Weatherford 2013, 493). Common national standards were long regarded as a “third rail” in educational politics—prior attempts under Presidents George H. W. Bush and Bill Clinton to create common standards had been scuttled by contentious debates over defining

including Bill and Melinda Gates, Eli and Edythe Broad, and the Walton Family.

Yet, questions remain about the longevity of the educational reforms advanced by philanthropic funding. Whereas other foundations may seek to replicate the perceived success of educational funders in the policy realm, the long-term outcomes of foundation-sponsored educational reforms remain unknown. In fact, Common Core and teacher quality have received significant political backlash at the state and local levels.

Common Core has faced pushback primarily from conservatives at the state level; three states have repealed the standards and others are reviewing them. The linkage between Bill Gates and Common Core is widespread in the media. A Lexis-Nexis search of newspapers with the search terms “Bill Gates” and “Common Core” produced 182 articles, including a substantial number of critical headlines: “Bill Gates Needs an Education on Common Core,” “Obama’s Dumbing Down of Academic Standards,” and “Doubts over Common Core Standards: Many Wisely Wary of Education Federalization.” Republican operatives regularly mention the Gates Foundation in attacks and commentary about Common Core. In 2015, *Politico* reported the following illustrative quote from Jim Stergios of the conservative Pioneer Institute:

The little engine that is Common Core opposition will continue its climb up the hill, picking up steam in West Virginia, Tennessee, Arkansas, Mississippi, and Alabama...I suppose that’s my way of telling the Gates Foundation to go dump a bunch of money in those states.<sup>3</sup>

Yet, “dumping money” in states does not appear to be an effective strategy for the Gates Foundation. Despite a \$6.5 million grant supporting Common Core implementation for Louisiana in 2011, Governor Bobby Jindal sued the Obama administration over Common Core and issued an executive order repealing the standards.

Moreover, some organizations are pulling back from the partnerships and strong advocacy that led to these reforms. For example, the American Federation of Teachers (AFT) announced in 2014 that it would no longer accept grants from the Gates Foundation. AFT President Randi Weingarten specifically cited the response from union members who were “unsettled by the implementation of the Common Core standards” as a reason for the AFT to break funding ties with Gates (Strauss 2014). Meanwhile, union leaders who oppose new evaluation systems based on test scores are finding common ground with the antitest “opt-out” movement, which involves parents who decline to send their children to school when standardized tests are administered. In New York State, 20% of students sat out of the state’s standardized testing in 2015—placing New York well below the 95% participation rate that was required by NCLB (Harris 2015).

A potentially contrasting story emerges from the trajectory of charter-school expansion supported by philanthropic funding. Charter schools have generated political opposition as well—particularly from teachers unions. Yet, charters have created their own political constituency among the families who choose these schools, and they have received backing from both political parties (Reckhow, Grossmann, and Evans 2015). Meanwhile, philanthropists are finding new political avenues to support charter schools. The largest philanthropic funder of charter schools—the Walton Family—recently created a 501(c)4 organization to support its work, the Walton Education Coalition. A 501(c)4 organization—unlike foundations or 501(c)3 organizations—can engage in electoral campaigns. The emergence of public constituencies supporting charter schools paired with strategic electoral involvement could be a powerful combination for further advancing procharter policies.

Although educational philanthropists demonstrate strategies for advancing policy change in education using non-governmental channels, many of their efforts emphasize elite coordination rather than building a broader and self-sustaining base of support. The strongly aligned policy recommendations advanced by leading educational foundations may have narrowed public debate about issues that are still widely contested and policies that may have substantial unintended consequences during implementation. Although the long-term policy outcomes are still uncertain, the previous decade has shown that philanthropists have the resources, capacity, and inclination to substantially shape the direction of educational policy at the national level. ■

#### NOTES

1. I collected data from the 2000, 2005, and 2010 990-PF tax forms filed by the 15 foundations that gave the most money for K–12 education. I used lists compiled by the Foundation Center to identify the 15 largest donors in each year. For each grant, I recorded the amount of the grant, the recipient, the recipient’s location, and the purpose of the grant. I also coded the national advocacy grants based on the issue priority advanced by the grant, using the grantee organization and the grant description to identify it.

2. This discussion draws on Reckhow and Tompkins-Stange 2015.
3. Available at [www.politico.com/tipsheets/morning-education/2015/01/new-year-new-executive-actions-who-is-bobby-scott-what-2015-will-bring-for-education-policy-212543](http://www.politico.com/tipsheets/morning-education/2015/01/new-year-new-executive-actions-who-is-bobby-scott-what-2015-will-bring-for-education-policy-212543). Accessed October 30, 2015.

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