

10-2013

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<https://scholarworks.gvsu.edu/jcppubs/21>

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MICHIGAN BENEFITS ACCESS INITIATIVE: ROLE OF THE OFFICE OF FOUNDATION LIAISON



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October, 2013



INTRODUCTION

The summer of 2008 was especially difficult for many in Michigan. The recession had resulted in economic devastation for families throughout the state. As Karen Aldridge-Eason, the director of the Office of Foundation Liaison describes it, “The economy was shifting and lots of people were being laid off and losing jobs for the first time.” Outside of Department of Human Services (DHS) offices across Michigan, hundreds of people lined up to battle the sweltering summer heat, waiting to apply for food stamps and other benefits to carry their families through the economic crisis. For many this was their first time through this process and it was a frustrating experience, with wait times extending to 8 hours or more, sometimes only to be told that the offices were closed when they finally reached the front of the line. In some communities, local sheriffs were called in to keep the peace. The stress on the Department of Human Services system had reached a breaking point and something had to change. Then-Governor Jennifer Granholm directed the Michigan DHS and her key policy director to come up with an improved online process for determining eligibility for benefits within six months.

This crisis jump started what would eventually become the Michigan Benefits Access Initiative (MBAI), a technology and community outreach strategy for connecting Michigan’s most vulnerable families to government benefits, of which an estimated \$930 million a year goes unclaimed in Michigan alone.¹ MBAI grew to represent an unusual public/private partnership between government, foundations and the nonprofit sector that went far beyond Granholm’s original vision. By 2013, approximately 5 years after its initiation, an on-line web portal is in place for individuals to easily apply for and access multiple benefits with just one application. The outreach strategy is flipping the DHS model for accessing benefits; instead of requiring clients come to them, they are more and more meeting clients where they are. Through MBAI outreach activities, community organizations that already work with needy families play a key role in connecting them to benefits. Through the end of 2012, MBAI trained over 1,000 individuals in community organizations across the state in the on-line portal system. They reached out to over 217,000 households, with 6,588 completing the web application.² The proportion of applications done online rather than “in line” at the DHS offices went from fewer than 7 percent to almost 30 percent by 2012, validating the wisdom of the two-pronged strategy of developing the technology and then investing in its use through nonprofit organizations across the state.

Over time, the Michigan Benefits Access Initiative has become a large and complicated undertaking for the state, needing the engagement of sectors beyond government and funding from private funders to achieve the potential to improve the lives of Michigan families. No one sector could do this work alone, and one of the key players in developing MBAI was the Office of Foundation Liaison (OFL), a non-partisan office housed in state government with the mission to broker strategic partnerships between the State and the philanthropic sector. This report focuses on the role of OFL in bringing the MBAI to fruition.

¹The Colton Group. (2009). *MBAI: Market Study, Analysis and Business Model Report*. Unpublished Report.

²Open Society Foundations. (2012). *Creating Portals and Transforming Cultures to Change Lives*. Unpublished Report.

THE HISTORY OF THE OFL

The Office of Foundation Liaison was the first of its kind in the country. While government and philanthropy working together to address critical problems is nothing new, joint efforts tend to be informal and episodic, based more on chance conversations than concerted strategy. Research about government-foundation relationships describes “growing evidence that foundations of various types and scale are taking active steps to engage with government on a more formalized basis ... [and] at the same time governments are exploring new ways to leverage philanthropic assets”³. The OFL in Michigan represents an attempt to promote mutual understanding and collaboration between the two sectors, and to facilitate strategic joint investments that benefit Michigan residents.

The Office of Foundation Liaison was created in 2003, with funding from Michigan foundations and in-kind and financial resources from the Governor’s Office. Michigan has the good fortune of having a strong association of foundations in the Council of Michigan Foundations (CMF), and CMF has served as the fiscal agent for the OFL. David Egner, the president and CEO of the Hudson-Webber Foundation, together with David Campbell, the president of the McGregor Fund, approached the newly elected Governor of Michigan, Jennifer Granholm, in 2003 with the idea of an office that would strengthen partnerships between the public and private sectors. The foundation community had created an office of foundation liaison in Detroit with then-mayor Dennis Archer. Based on what was learned in Detroit, the Office of Foundation Liaison was created for the State. Karen Aldridge-Eason was recruited from the C.S. Mott Foundation to serve as the Foundation Liaison. Her philanthropic experience together with previous experience in local and state government, made her the ideal person to lead the new office. Today, ten years later, she continues to serve as the Foundation Liaison, together with Maura Dewan, the Foundation Coordinator.

The Michigan Benefits Access Initiative is one of many projects of the OFL, but arguably the most successful. Over the years, the OFL has brokered more than \$100 million in foundation investments to improve Michigan’s economic competitiveness and to improve the lives of Michigan’s residents. While the financial contribution of foundations is important, the

successful partnerships brokered by the OFL go well beyond the funding. For example, in the area of early childhood, the OFL played the key role of convening state administrators, school officials, researchers and foundation leaders to help coordinate the state’s early childhood programs. The philanthropic sector provided funding and expertise, while the commitment of all sectors led to the development of the Michigan Office of Great Start, signed into being by Governor Snyder’s executive order.

They were with it through the whole thing... For the OFL, the MBAI was really a full-service undertaking.

- Ali Webb, W.K. Kellogg Foundation

With MBAI, the Office of Foundation Liaison was engaged from initiation, to vision, to joint grantmaking to documenting results to building a sustainability plan. As described by Ali Webb, Director of Michigan Programs at the W.K. Kellogg Foundation, “They were with it through the whole thing ... For the OFL, the MBAI was really a full-service undertaking.” It required the OFL staff to use the position of the office to its best advantage, showing the potential for what an office like this can contribute. “MBAI in my mind was one of the first big projects for OFL of doing a joint public/private partnership with multiple funders to achieve a vision,” commented Scott Dzurka, CEO of the Michigan Association of United Ways, a key partner in MBAI.



³Ferris, J M & Williams, N. (2012). *Philanthropy and Government Working Together: The Role of Offices of Strategic Partnerships in Public Problem Solving*. Los Angeles, CA: The Center on Philanthropy and Public Policy, Sol Price School of Public Policy at USC, p. 1.

ROOTS OF THE MICHIGAN BENEFITS ACCESS INITIATIVE

Because the severity of the challenges facing Michigan during the Great Recession were widely understood, many different players were working to create new approaches to benefit access. In 2008 - 2009, these players tended to act independently.

STATE OF MICHIGAN ACTIVITIES IN 2008-09

In 2008, when then-Michigan Governor Granholm decided to take on the challenge of developing an online system for checking eligibility within 6 months, there were extensive roadblocks to success. Medical, housing, food, and energy benefits all had different systems, different eligibility requirements and no interface.⁴ Benefits were administered by different state agencies, creating a need for collaboration and a shared vision across these agencies for a more coordinated system to emerge. Initially, the work resulted in Helping Hand, a website that allowed individuals to check on eligibility for benefits, but did not process applications online. The Department of Human Services though, once they started work on the online system, went well beyond the government mandate to create Bridges. Development of Bridges, an online portal that established a common eligibility determination system, required funding and collaboration between the Michigan Department of Human Services, the Department of Technology, Management and Budget, the Department of Community Health, and the State Auditor's office. The state invested almost \$200 million to create Bridges.

PHILANTHROPIC SECTOR ACTIVITIES IN 2008-09

In early 2009, George Soros, founder of the Open Society Foundations (OSF) was exploring ways to provide aid to families in the United States who were suffering as a result of the economic crisis. He had set up a 'Special Fund for Poverty Alleviation', which was directed by Mimi Corcoran. Michigan kept emerging from the research as a state that was hit especially hard by the economic crisis. Through a connection with the Mott Foundation in Michigan,

Corcoran engaged Benita Melton as an executive on loan to provide local expertise to OSF. One of their first connections was with Karen Aldridge-Eason and the Office of Foundation Liaison. Given the interest of Soros in addressing fundamental poverty issues, it made sense to connect with the government liaison to Michigan's philanthropic community. The Office of Foundation Liaison provided OSF three to four different possibilities of funding opportunities to help newly unemployed individuals and MBAI eventually became the selected investment.

Michigan funders had also begun to engage in conversations about how to better connect residents with state and federal benefits and, in some cases, (e.g., the W.K. Kellogg Foundation), had begun giving grants to support this work.

NONPROFIT SECTOR ACTIVITIES IN 2008-09

In the meantime, the nonprofit sector and particularly the Michigan Association of United Ways (MAUW) were exploring how to provide better access to benefits for vulnerable Michigan families. There were few outreach and education initiatives to help families understand what was available to them, and outdated technology for connecting families to benefits. The national United Way was exploring the idea of creating its own web-based platform. The MAUW was in discussions with nonprofit organizations in Michigan to determine how to develop a system that would work for Michigan. Technology vendors across the country were designing and marketing different platforms. In 2008, a Kellogg Action Lab grant (from the W.K. Kellogg Foundation) gave the MAUW the funds to bring key players together and explore emerging technology and good practices. MAUW led a 40 member group of key stakeholders from across the state including state agencies and nonprofit associations and organizations. Through the grant, the MAUW worked with an external consulting group to do a market study to identify a technology platform and develop an outreach plan. By early 2009, they had selected a technology vendor with experience in working with other states, including Ohio, to adapt the system for Michigan and proposed a broad outreach plan to train 2,000 counselors across the state in the use of that system.

⁴Open Society Foundations *ibid.*

BUILDING RELATIONSHIPS: THE EARLY ROLE OF OFL IN MBAI

What became clear as 2009 unfolded was that the DHS, which was building the MI Bridges system and MAUW and its partners, which had selected a technology vendor and started fundraising for outreach, were embarking on two parallel and conflicting paths to online benefits access. This came to a head as federal Economic Recovery money became available and MAUW was looking to the state to provide them with a letter for their federal application. The state hesitated. It was at this point, says Maura Dewan from the OFL that “we were thrust into the middle ... all these forces started coming together [but], we knew they were doing different things.” Aldridge-Eason continues, “We started saying [to MAUW], ‘Look the state is going down this other path.’” Eventually, the executive office signed off on a letter, but it took a lot of effort. While they didn’t end up getting Economic Recovery money, it highlighted the need for collaboration between

As the Michigan Benefit Access Initiative was forming, the OFL played a critical role in convening partners and helping to create a mutual understanding of the goals and vision for the initiative.

the nonprofits and the state government agencies. On the foundation side, Ali Webb had been planning to fund MAUW’s technology platform and outreach, unaware of the state’s MI Bridges effort. The OFL staff intervened at that point. As Ali Webb describes it, “The essence of what Karen did was flag for me that the state was more interested in improving their own portal, rather than having another portal created. That conversation would never have happened if Karen hadn’t understood what state agencies wanted to have happen.”

According to many of the key partners at the time, Rob Collier, President of the Council of Michigan Foundations, steered individuals from the nonprofit organizations and the foundations to connect with Aldridge-Eason and Dewan.

Scott Dzurka says, “Rob suggested that, based on conversations with the Kellogg Foundation, we want to see this become a public-private partnership. It was Rob who said, ‘We need to connect you in.’”

One of the key challenges that had to be overcome at this early stage was the lack of trust and communication between the different sectors. Researcher James Ferris notes that offices like the OFL in Michigan spend, “significant time creating opportunities to build relationships and identifying and working with individuals, who understand the struggles their partners face”.⁵ In the early days of defining the benefits access work in Michigan, OFL focused on building relationships between the nonprofit, the philanthropic and the government partners. David Campbell, president of the McGregor Fund, observed, “I think Karen is the one who brought people to the table and kept them there ... Karen is so widely respected, when she asks you to come to a meeting, you do, because you know she is not going to waste your time. She has a proven credibility.” Carol Paine McGovern, the president of the Paine Family Foundation described, “they can pick up the phone and call anyone based on their connections and their credibility over 10 years ... They have the ability to really grasp the breadth of an issue. They do their homework if it’s something new ... And they are very inclusive in any type of gathering they pull together.”

CREATING MUTUAL UNDERSTANDING

As the Michigan Benefit Access Initiative was forming, the OFL played a critical role in convening partners and helping to create a mutual understanding of the goals and vision for the initiative. Four MBAI workgroups were created: the Steering Committee, Learning Collaborative, Outreach, and Tax Credit. The OFL convened multiple meetings with funders, nonprofits and government officials to determine the best course of action.

The OFL worked with Melton, the Mott Foundation executive on loan to the Open Society Foundations, to put together meetings with about six state departments, and Michigan foundations to hear about ideas and projects.

⁵Ferris, J M & Williams, N. *ibid* p. 15.

As Mimi Corcoran from OSF described it, “They met with a commissioner and state representatives and governor’s office people and Michigan foundation representatives and asked them to propose different ideas within the OSF poverty frame of benefits access, education and workforce and the OSF requirement of 1:1 from Michigan foundations or private partners as well as government, from those discussions emerged projects such as the Fair Food Network, MBAI, and Earn and Learn.” The Office of Foundation Liaison served as the convener of these many funders meetings to determine the best investments. Corcoran describes her concern for the MBAI project at the time that, “We were duplicating technologies ... I said, ‘I don’t have any interest in having two [systems]: MI Bridges and MBAI, unless it is justified.’”

Some of these early funders meetings did not go well, with the different partners still pushing competing ideas of focusing on an extensive outreach network, or implementing an off-the shelf technology instead of building out the the state system. In their own words, Aldridge-Eason and Dewan said, “[the OFL] took on the mantra that this is not about either organization in the state, it’s about the children and families in Michigan that we will help.” The OFL had the credibility and the neutrality to be able to push this mantra.

Creating mutual understanding across the sectors required an understanding of what foundations and the government wanted. The OFL staff used their experience working in both the foundation and the governmental sectors to translate the expectations and needs to the other sector at various points in the process. The Open Society Foundations and the other funders wanted to invest in a benefits access system, but only as a supplement to government investment in a system. The OFL helped everyone understand that the state had already invested \$200 million into Bridges, providing a real justification for using supplemental philanthropic funds. This change in perspective allowed all parties to see the wisdom of investing in a build-out of the current state system. The philanthropic community was there to make up the shortfall so this urgent project could fulfill its potential. Ali Webb described, “We provided resources for the last mile to get things done.

We’ll make up the gap, provide that last millions of dollars that would allow this thing to go forward and that was the argument that Karen was able to make and then I was able to deliver on. This wasn’t anything I would have known or been able to do, without OFL playing this role.”

The OFL had to engage in a lot of hands-on work to get the nonprofit, governmental, and philanthropic sectors to mutual understanding about MBAI. Aldridge-Eason described, “We kept each other committed to having conversations before meetings and we did lots of work before meetings, including drafting agendas, setting talking points, figuring out what to bring to meetings, making calls before meetings,

The OFL had to engage in a lot of hands-on work to get the nonprofit, governmental, and philanthropic sectors to mutual understanding about MBAI.

*- Karen Aldridge-Eason,
Office of Foundation Liaison*

making comments on drafts.” Key stakeholders talked about how the OFL staff called multiple group meetings, and worked to make make sure that everyone knew their role and the expectations. Andrew Gatewood from the Kresge Foundation commented, “Their strength lies in their knowledge of the majority of foundations and their ability to keep key legislators informed ... their ability to relate to both sides has allowed them to be very effective.”



CREATING A SHARED AGENDA AND MEDIATING DECISIONS

Eventually the list of funders included: the W.K. Kellogg Foundation, the Open Society Foundations, the Kresge Foundation, Consumers Energy Foundation, the DTE Foundation, the Ford Foundation, the McGregor Fund, and the Max and Marjorie Fisher Foundation, among others. Coordinating the multiple funders with interest in investing in MBAI was a primary task of the OFL. As Doug Bitonti Stewart, Executive Director of the Max M. and Marjorie S. Fisher Foundation described, “Working for foundations, we can individually get meetings. However, what’s really important about what the OFL does is they coordinate our efforts so we can listen and share together at the same time. It’s efficient for both the foundations and the government officials. We can have a real-time exchange of ideas, instead of 12 individual meetings where we walk away with 24 different impressions.”

Those meetings had between 40 and 60 people in the room, including funders, Department of Human Services staff, Department of Management and Budget staff, MAUW staff, and others. The challenge was to lead these disparate parties towards a shared agenda and shared vision for MBAI. The OFL was critical to this task. Some of the challenges they faced with the foundations were coordinating funders’ schedules and dealing with the different expectations and reporting requirements for each. Within state government, the multiple agencies responsible for medical, food, housing, and energy benefits had different requirements and had different pieces of the benefits puzzle. Funding and implementing MBAI was going to require several state departments to work together, including the Michigan Department of Human Services, the Department of Technology, Management and Budget, the Department of Community Health, and the State Auditor’s Office.

At this early stage, the Foundation Liaison realized that in order to get everyone on the same page, there needed to be a collective decision on whether the technology vendor that WKKF was ready to fund through the MAUW was the right way to go. The OFL organized a trip for Michigan funders and high level state employees to Ohio in December 2009 to see

in person the benefits access system that was being proposed for Michigan. This was a turning point for the work. The nonprofits, foundations and government realized that the Ohio system was not going to work for Michigan and instead, the efforts needed to focus on strengthening the existing MI Bridges system. Aldridge-Eason used their existing relationships and credibility with the partners to bring them to the table so they could make this critical decision. One of the roles of the OFL is to share best practices and research and this was a critical step for MBAI.

Throughout 2010, key decisions were made that determined the shape and scope of the benefits access work. The W.K. Kellogg Foundation shifted its investment focus from outreach to technology, and encouraged the building out of the state’s Bridge’s system to what would become MI Bridges. The Open Society Foundations’ Special Poverty Alleviation Fund required a 1 to 1 match by private funders for its entire investment, thereby bringing in many small, local funders to add to the list of partners. OSF decided to focus on the community outreach portion of the access work. It was hard, messy work for this varied group to come to agreements. Mimi Corcoran from OSF described OFL’s role, “People would ask for different things and Karen would make it happen ... It’s a big task to get everyone coordinated and to understand the politics behind different things and be sensitive to it.”

At times, the OFL played an active role in working out disagreements. Part of this was about making sure the right people were in the right conversations to make sure that partners were held accountable for commitments. David Campbell describes, “As problems are being identified, Karen would know who the person from state government would be in the position to solve the problem, and would get a commitment during that meeting to get the problem solved.” At other times, the OFL staff tutored partners on how the systems would come together and made sure important technical information got to the right people. The different funders had different levels of interest, whereby some funders were engaged in all aspects, while others wanted to be engaged only when they were needed. The cultural differences between philanthropy and government created challenges, as well. Scott Dzurka described, “State government has a decision making process involving several individuals that we need to respect, and [having] very many people to

dictate a process takes baby steps ... Sometimes a foundation and nonprofit organizations have the ability to move much more rapidly. Knowing you have three partners that function at different speeds along that spectrum helps.” Susan Broman, Deputy Superintendent of the Michigan Department of Education - Office of Great Start says, “OFL has a good understanding of the different sectors – they act as a translator ... I think they are incredible at explaining the cultural differences.” Because of their neutral status and credibility with the various partners, OFL was in the position to play these critical roles.

MANAGING THE TRANSITION ACROSS GOVERNOR'S ADMINISTRATIONS

By early 2010, the state agencies committed to selecting and hiring the technology vendor to complete the building out of the MI Bridges platform. The Granholm administration was coming to an end in 2010 and state's projections that approximately 400,000 people were going to lose unemployment benefits by the end of the year, with more expected. It took many more meetings, as well as pressure by foundations and pushing by the Office of Foundation Liaison to complete the vendor selection process during the Granholm administration, with Deloitte Consulting LLP ultimately selected as the vendor.

The change of administrations, with elections in November 2010 and a new administration starting in January 2011 was a potential threat to the progress made on the Michigan Benefits Access Initiative. In Fall of 2010, Rob Collier started putting together meetings with gubernatorial candidates to start explaining the OFL and the MBAI work. “We were literally a talking point on Rob's card,” says Aldridge-Eason. As it became clearer that Rick Snyder was the candidate, the Foundation Liaison, Aldridge-Eason was able to meet directly with him and talk about MBAI.

As Scott Dzurka observed, “During transitions is when you traditionally see projects dissipate and this was clearly a program that began during the Granholm administration,” with Snyder inheriting something that wasn't his. The fact that the MBAI survived the changing of the guard is a result of a number of factors.

Perhaps most importantly, the MBAI was supported by a broad set of stakeholders, particularly in the philanthropic community. Collier and the OFL staff were able to make the argument that the MBAI, “has significant foundation investment, and is a perfect example of a public-private partnership ... We believe it can transcend administrations due to the foundations and nonprofits that are supporting it.” The fact that some of the new Governor's donors also had large foundations was an incentive. Another compelling argument was that MBAI would save the state money, while providing qualified individuals access to resources more efficiently. Mimi Corcoran describes, “Streamlining technology and processes was going to save [Michigan] money ... For any leader that's an appealing and compelling piece.”

The Office of Foundation Liaison was seen as a politically neutral party. This was a deliberate part of the vision of the Office of Foundation Liaison, and put into practice by the OFL staff.

A second factor was the fact that the Office of Foundation Liaison was seen as a politically neutral party. This was a deliberate part of the vision of the Office of Foundation Liaison, and put into practice by the OFL staff. Aldridge-Eason and Dewan have built relationships over the years not only with political appointees, but with civil servants in state government. Ali Webb describes, “Karen has a set of relationships with the permanent government, i.e. the civil servants that span administrations, and so MBAI was able to continue while Karen and Maura worked out their relationship with the new political group. They wouldn't have been able to do that if they hadn't already had the relationships.”

The OFL worked extensively with the transition team in late 2010. Mimi Corcoran describes how, “Karen did a lot of backdoor conversations about what was happening [with MBAI], and who was involved, and the investments ... and how it really fit nicely into the health care transitions and what [the Governor] was hoping to accomplish in the state, and it really helped to allow the administration to see that it was on the right track and allow the administration to

go forward.” In December 2010, OFL hosted a large stakeholder meeting about MBAI and Bill Rustem, the governor’s policy advisor, attended, as well as others from the administration.

JOINT INVESTMENTS

The MBAI was officially launched in January 2011, with the State of Michigan-approved contract to develop a bundled benefits access portal for all DHS programs including Medicaid, cash assistance, child development and care, and non-energy state emergency relief.⁶ Meanwhile, the OFL was figuring out who from the new administration would own the MBAI work. Eventually, Duane Berger, the Chief Deputy Director of the Department of Human Services became the lead on MBAI.

The outreach and access aspects of MBAI came to the forefront in early 2011, requiring coordination by the nonprofit sector to implement service delivery in the community. The model for outreach that was eventually agreed to by the key partners was to focus not on the number of counselors being trained (the original proposal had a target of 2000 trained counselors), but rather to build the capacity of existing nonprofit organizations to use the new system. As Aldridge-Eason describes, “We wanted nonprofits to integrate this into their work ... [For example], if you are a housing agency, this is what you ask someone who comes to you for help with housing.”

Three key outreach projects began in 2011: 1) a community outreach pilot project in Southeastern Michigan; 2) a prisoner eligibility project and; 3) a community college pilot project. The primary funders of these activities were the Open Society Foundations, the W.K. Kellogg Foundation, the Kresge Foundation, and the Ford Foundation. The MAUW and the United Way for Southeastern Michigan (UWSEM), with assistance of a technical assistance provider, SEEDCO, led the process of hiring an MBAI Outreach Coordinator and beginning implementation of the outreach projects in 2011.⁷ A MI Bridges training curriculum was created and used to conduct training sessions at pilot sites. The prisoner eligibility project began in March 2011 with the goal of helping prisoners to determine eligibility and eventually apply for state and federal benefits upon release from prison. Throughout that summer, eligibility specialists were hired and trained on using the MI Bridges system and the various other assessment systems used by the state. The community college pilot project started work that summer with two

pilot sites, Macomb Community College and Lake Michigan College to help community college students access DHS-administered benefits. Eventually in 2011, MAUW was awarded a grant from AmeriCorps to place 33 Community Navigators around the state to access benefits through MI Bridges, as well as other community resources through the 2-1-1 database, a United Way program.

For the state, the outreach piece of the Michigan Benefits Access Initiative really challenged the prevailing model of clients having to come to DHS offices to get benefits. As Duane Berger describes, “We agreed that we needed to break the business model and get out there ... We needed to get out to where the clients are.” The partnership with the nonprofit sector, always part of MBAI, was critical to influencing the DHS to changing its business model and in carrying out the outreach goals.

Up until 2011, the governance of MBAI had been loosely structured, with the Office of Foundation Liaison often facilitating and convening. The evaluation of MBAI done by Public Policy Associates recommended formalizing the governance, especially important as the scope of the work and the numbers of nonprofit partners and funders grew. In the fourth quarter of 2011, a formal MBAI Steering Team was established composed of key stakeholders from the state, nonprofit organizations, and with the OFL serving as the foundation representative. The first Steering Team meeting was held in November 2011, and was chaired by the Chief Deputy Director of the Michigan Department of Human Services, currently Duane Berger, signaling the integration of the MBAI into the administration.

During this phase of joint investment by multiple foundations in the outreach component of MBAI, the OFL continued to play a critical role of conduit between the foundations and the state officials. As Scott Dzurka describes, the OFL, “makes sure that the voice of the foundations is maintained on the steering committee.” Their role has become more one of “listening, taking back thoughts, ideas, and progress” to the foundations. On the state side, Bill Rustem describes the role of OFL as “monitoring state government to make sure that they follow through in implementing the ideas.”

For foundations, one common challenge is that once the grants have been made, they can lose their leverage and their place at the table to see the results of their investments. Rob Collier describes the OFL as “making sure that these public/private partnerships are truly joint partnerships.” Because of their position “in, but not of” the state government, they can bring to life the perspective that “the partnerships they help catalyze should extend beyond funding alone”.⁸

DOCUMENTING RESULTS, EVALUATION, AND SUSTAINABILITY

The work has moved from being a separate initiative (Michigan Benefits Access Initiative) to becoming internalized into the workings of the Department of Human Services, and has thus changed its name to MBA (Michigan Benefits Access). Throughout 2012 and 2013, as the numbers of MBA partner across the state has grown, there has been a growing interest in looking at the outcomes of MBA and how to further embed it into systems. Dona Ponepinto, Vice President with the United Way for Southeastern Michigan commented, “[The OFL] did a good job at helping us think about sustainability and evaluation. How are we evaluating this? What are we doing to help sustain this?”

The OFL helped to push for accountability on all parties. Their ability to play this role could be due to their position as a neutral party.

Documenting results of the MBA has taken a few different forms: MAUW commissioned Public Policy Associates to conduct an evaluation of the progress, the DHS gathers basic information at the state level about how many individuals are getting services and receiving benefits, and SEEDCO has helped to build reporting and evaluation at the individual site level.

Still, documenting results has been described by many different partners as one of the challenges experienced by the program. Scott Dzurka explained, “Ongoing, the challenge that

we face is getting information at points that we need from state government ... OFL is helping us to secure what we need ... Sometimes the state has different priorities for data.

Fortunately, the state has delivered for the funding community and that’s important because the funding community wants the data and we’re dependent on the state to get that.” While an interest in outcomes is shared by the different sector partners, government rules about transparency and accountability are different from those of the philanthropic and non-profit sectors, who report to trustee boards.⁹ These often lead to different expectations for gathering and reporting data by the partners. In the case of MBA, the OFL helped to push for accountability on all parties. Their ability to play this role could be due to their position as a neutral party. Aldridge-Eason describes, “At times we push back on the governor’s office and at other times on the foundation community ... We try and use our negotiating power wisely.” Rob Collier commented, “I think the [OFL’s] oversight, monitoring, and convening role is particularly important. After the money goes, the foundation’s leverage could go away.” Similarly Chauncy Lennon from the Ford Foundation described, “[With the OFL in place], there is more accountability. Having the government involved, the agencies had to act on their commitments. Having the OFL made this clear ... The fact that the office exists conveys the seriousness of these relationships.” Having the OFL in the middle, sharing information with the philanthropic community and communicating expectations to the state encourages that the partnership lasts beyond the funding.

Sustainability of MBA after the ending of foundation support has become a priority for both the DHS and the MBA leadership. One challenge in forging partnerships between foundations and government is hesitancy to apply outside funding to work that is considered the responsibility of government. In the case of MBA, the Office of Foundation Liaison originally helped to clarify the fact that the state invested \$200 million in the initial MI Bridges system and that outside funding could support the build-out of the model, the engagement of key nonprofit partners and the infusion of best practices from other states. Sustainability is now about incorporation of MBA into the DHS and nonprofit service systems. So far, most of the community outreach pilot sites and the community college sites have incorporated MBA services into their programs and the AmeriCorps members are now focusing

⁸Ferris, J M & Williams, N. Ibid. p.15

⁹ Ferris, J M & Williams, N. Ibid. p.17

activities on recruiting and supporting new community outreach sites. Now, the DHS is working on a related initiative entitled Pathways to Potential to bring DHS workers into schools. “We started in four high crime cities, putting workers into the schools, and quickly recognized that we needed better community connections,” says Duane Berger. This work evolved out of the new DHS perspective of going to where the clients are. Ultimately, Aldridge-Eason describes, “We’re trying to help the department more than anything make this system work in away that is designed to be more supportive of residents ... to say, ‘we believe you can do something and if we help you, you can build your skill set, you can take care of your family better and you can be a stronger member of your community.’” OFL is providing to Pathways to Potential a connection to best practices in school-community models across the state, as well as figure in a role for philanthropic funding and expertise.

Sustainability is now about incorporation of MBA into the DHS and nonprofit service systems. So far, most of the community outreach pilot sites and the community college sites have incorporated MBA services into their programs and the AmeriCorps members are now focusing activities on recruiting and supporting new community outreach sites.

As the work continues to evolve, the OFL is making sure to keep the issue of sustainability on the table. Medicaid expansion and the Affordable Health Care Act have important implications for the MBA system and staying ahead of it is critical. “We remind people to keep asking questions about how this will work with Medicaid ... and how this will work with the insurance exchange, which are still outstanding issues with the expansion,” says Aldridge-Eason. Keeping MBA utilized in the community requires ongoing training of nonprofit partners, both because of high staff turnover and the need to continuously improve

and expand the system to incorporate new benefits programs.

HOW THE MICHIGAN BENEFITS ACCESS INITIATIVE BENEFITED FROM OFL

Partners from all sectors expressed that developing Michigan Benefits Access would have been a different, more challenging, experience without the Office of Foundation Liaison. And, according to stakeholders from all sides, one of the critical factors in the success of the OFL and its effective contribution to initiatives like MBA is the staff itself. As Carolyn Bloodworth, director of corporate giving at Consumers Energy described, “Karen and Maura are the strengths.” Scott Dzurka from MAUW commented, “The project wouldn’t have come together without them because building public/private partnerships is challenging work ... The OFL was highly instrumental at bringing everyone to the same speed and bringing the foundations into the dialogue.” Especially in the early convening days, the OFL acted as translator between the different sectors, helping to clarify expectations of partners to each other.

For the foundations, the fact that the OFL had a birds-eye view of the competing DHS and MAUW visions for a technology platforms and was able to communicate this clearly, helped to prevent potentially wasteful investments. Ali Webb from the Kellogg Foundation said, “We would have funded a pilot that would have been successful for the few people who participated in it ... We wouldn’t have had a lasting change in how state government delivers benefits. It would have been a classic example of philanthropy proposing a solution that wasn’t the right solution.” OFL played this intelligence-gathering role throughout, helping foundations to make more informed decisions about what to fund. Bill Rustem described the OFL playing a similar role for the state: “They are actively engaged in the learning process for state government.”

The OFL role of bringing good practices from other places to the work had an important impact on MBA. The visit to Ohio in which multiple partners all saw at the same time the ways in which that model was not a good fit for Michigan was a turning point in building a shared vision.

The relationships that Aldridge-Eason and

Dewan have with foundation staff throughout the sector were critical to the project. They could bring individuals from multiple foundations together to listen to the vision for MBAI. “Having that Office in place makes it so much easier for the foundations ... and is a win for the state in terms of getting their work aligned”, says Scott Dzurka. “My experience from years ago, I always recall departments each making their own ask [of foundations]. It must have been a tremendous burden.” With the Office available to act as a liaison, it pushes both the philanthropic and government sectors to be more strategic about what they ask of each other. And getting through the difficult decisions required forging strong relationships between partners. OFL helped to build these bonds. “I don’t think that without their facilitation, [MBAI] would have happened ... the Office kept the communication going,” says Andrew Gatewood.

The OFL was a necessary catalyst, but the foundations, nonprofits and government had to be willing to work together to make MBAI work. Mimi Corcoran describes, “You can have an OFL, but if philanthropy doesn’t want to play and government doesn’t want to play in that sandbox, he or she isn’t going to be effective. There was a really enormous willingness to engage by all concerned ... The only way this could get done was if everyone was willing to participate and that was only going to happen if people felt that their work was valued and their voices were heard.”

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- Ali Webb, W.K. Kellogg Foundation



For more information about the Office of Foundation Liaison,
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