

# 2017 Pennsylvania Foundations Public Policy Conference

A Report on the 2017 Pennsylvania Foundations Public Policy Conference:  
Amplifying the Voice of the Sector  
May 1–2, Harrisburg, PA



## About This Project

Philanthropic funders in the State of Pennsylvania came together May 1 & 2 in Harrisburg for the purpose of strengthening the sector to be an effective voice in State policy making, and with an eye toward collaborating on issues particularly related to human services, education reform, and the impacts of the State budget.

Four different policy areas were addressed through a series of Human-Centered Design (HCD) workshop activities facilitated by MAYA Design: Human Services Funding, Communities in Crisis/Act 47, Fair Education Funding, and the Opioid Crisis.

The goal for the conference was to create a network for learning, sharing, and organizing action that can leverage the collective power of philanthropy in Pennsylvania. This would include financial, leadership, and knowledge capital for the purpose of promoting public policies that advance positive community change.

The following meeting outcomes were established:

- New relationships created, old relationships strengthened through collaborative exercises and opportunities for conversation.
- For each topic area: Areas of opportunity for collective action, as well as individual foundation action identified.
- For each topic area: Actionable opportunities prioritized according to level of impact and execution difficulty.
- For each topic area: 3-5 actions plotted along a timeline for execution.
- Barriers and constraints for action per foundation identified, along with strengths.

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### MAYA Team

**BRIDGET MONAHAN**  
Senior Designer & Researcher

**DAVID BISHOP**  
Director of Human Sciences

**BRETT LEBER**  
Designer & Researcher

**TRACI THOMAS**  
Service Design Lead

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MAYA Design, Inc.  
Project Manager: Brett Leber  
Four Gateway Center  
444 Liberty Ave., Suite 1600  
Pittsburgh, PA 15222  
(412) 488-2900  
www.maya.com

# Executive Summary

1. Gov. Tom Wolf has proposed the consolidation/unification of the Departments of Aging (PDA), Drug and Alcohol Programs (DDAP), Health (DOH), and Human Services (DHS).

## Opportunities for Collective Action

The workshop activities were designed to identify potential opportunities for foundations to take collective action in the four topic areas. Each team was able to identify a big idea for collective action and establish details for the concept including how it would work, why it might fail, and what success looked like; several included a roadmap plotting actions against a timeframe.

### HUMAN SERVICES

#### Collective Action Big Idea: Clearinghouse of Information on Human Services

Establish a clearinghouse of information for a coordinated philanthropic focus in Human Services. The two big opportunities are:

- To better inform the Pennsylvania Department of Human Services unification process<sup>1</sup> at the state level with data (county-specific information)
- To address the key indicators of human service needs in the context of poverty

**First Step:** The group will look at existing statewide models/orgs (like the successful Health Funders Collaborative). They will then convene a meeting of interested groups, in partnership with the Council on Foundations.

### COMMUNITIES IN CRISIS / ACT 47

#### Collective Action Big Idea: Political Campaign to Save Our Communities

A high-profile roll-out of the PEL study, including speakers, earned media, social media, and outreach at local and state levels. As with a political campaign, the study can be used to force issues.

#### Collective Action Big Idea: From Commonwealth to State

The ultimate goal is to move from a model of fragmented government that poorly serves citizens to a better, more consolidated government that **supports** citizens. This is a model of Pennsylvania as a “state” more than a “commonwealth” in the sense that government is more consolidated.

# Executive Summary

## Opportunities for Collective Action

### FAIR EDUCATION FUNDING

#### **Collective Action Big Idea: Convocation to Identify Gaps and Build Funding Framework**

Convening funders and advocates to understand and identify where the gaps are related to fair education funding. Once the group has established a solid understanding they will define a path forward by creating a philanthropic framework that will enable funders to engage more deeply in the Fair Education funding campaign.

**Roadmap:** The funders meeting will be held in September 2017; Align and prioritize ideas by December 2017; Begin implementing funding framework in 2018.

### THE OPIOID CRISIS

#### **Collective Action Big Idea: Collaborating to Fund Service Gaps through Collective Data**

By pooling resources and using standardized data the group would be able to fund solutions to fill gaps that exist in serving the needs of the addicted. Currently there is no aggregated standard and consistent data that can be used statewide. By convening a statewide data summit, gaps can be identified and prioritized for funding.

**Roadmap:** In Q3 2017 the committee will establish county teams consisting of one funder, one agency, and one legislator. Through the end of 2018 the group will plan the Data Summit to be held in either Q2 or Q3 of 2018.

# Executive Summary

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There were three common themes across all breakout workshops. These themes raise some questions to consider:

- What types of action does the scope of the four topics require? Bolder, possibly untried actions or tried-and-true methods?
- Is it worthwhile for Pennsylvania foundations to collectively fund systems or infrastructure that can be shared across foundations? Should this be instead of or in addition to directly funding opportunities within these topic areas?

## Common Themes Across Topic Areas

Despite breaking out into four working sessions devoted to a single topic, there were common themes seen across the workshop activity data.

### THEME 1

#### The Need for Courage To Do More

Throughout the discussions and work activity in each session, there was either an implicit or explicit sense that funding organizations and their boards needed courage or confidence to take action, especially in doing things outside of their “normal” capabilities.

For each topic, the scope of the issue seemed very large, sometimes making it difficult to know how and where to dive in or what actions would have the most impact. Of the four big ideas roadmapped from each breakout session, three involved convening another meeting with funders and advocates to determine gaps and plan actions, and the fourth looked for ways to promote and leverage a study that had already been completed. It may be that bolder, outside-the-norm ideas are not a realistic or useful way to expend limited time and resources.

**It may also be that funding organizations need more experience working collectively on policy and on these issues to know what works.**

### THEME 2

### THEME 3

# Executive Summary

## Common Themes Across Topic Areas

Despite breaking out into four working sessions devoted to a single topic, there were common themes seen across the workshop activity data.

### THEME 1

### THEME 2

#### **The Importance of Building Awareness**

For each of the topics, building awareness of the issues involved and educating people about solutions were critical components of action. Different groups identified similar methods, such as media campaigns, social media presence, lectures and luncheons, etc.

Since the success of the issues foundations work on involve public awareness and education campaigns, systemic frameworks or overarching communications strategies could be an operational tool shared by a collective. **Effective guidelines and best practices in communicating to different stakeholders and about certain topics could be established for PA foundations to share and update.**

### THEME 3

# Executive Summary

## Common Themes Across Topic Areas

Despite breaking out into four working sessions devoted to a single topic, there were common themes seen across the workshop activity data.

THEME 1

THEME 2

THEME 3

### Valid Data a Critical Component to Funding

Across groups there was a great need for data to either be proof of the importance of taking action or as measures of success. Data seems to play an important role in validating decision-making and urging action. Yet for many groups, they didn't have the data they needed, or they didn't know what data existed or where it resided.

One of the collective goals could be to establish a common database or storehouse of information on these topics so that reliable and valid data is always available for decision-making and guidance. **This networked dataset could be maintained and updated on an ongoing basis.**

# Human Services

# Problem Statement

## Overview

The DHS budget is large (\$35B); larger than the state's general fund budget. This is not all state tax dollars; more than half comes from the federal government. Almost 50% goes to Human Services (second-largest portion goes to Healthcare).

Over the past 40 years, we've moved from a state-funded, county-run model to a federally-funded, state-run model.

It is early to draw conclusions from the 2017-2018 DHS budget, but there are indications that funding will increase for:

- Opioid treatment
- Continued Medicaid expansion
- Community-based services for people with disabilities and seniors.

Funding may decrease for:

- Nursing home services
- Homeless assistance
- Human Services development fund
- Child care assistance
- Community-based family centers
- Community mental health services
- Nurse/family partnerships

## More Stable Funding is Needed

Government funding is in flux, both in the long term (changes in the model) and the short term (year-over-year budget changes). The fact that such a large portion comes from the federal government and that there has been a recent change in administration means that there are more unknowns than in other years.

## There Is a Lack of Knowledge About Funding

Funding (money itself) is an issue, but so is knowledge about funding sources and projections of future funding. Philanthropists need to know where their money and effort can be best and most effectively spent. Efforts can be more efficient if they are coordinated. Government, philanthropy, non-profits, and businesses must be aware of budgets and policies as well as what each other are doing.

To better inform processes, more data is needed at county-specific (and below) level. Key indicators of human services needs must be measured.



Table discussion during world café activity

## There is Not a Unified Focus Among Local Funders

There is no coordinated philanthropic focus and infrastructure around human services. This is important for philanthropic funding, but coordination can also help influence policy (and therefore government funding and initiatives).

## Legislative Inertia and Lack of Political Will May Prevent Change

Siloization and parochial thinking both work against goals to improve Human Services. Politicians aren't seen as more electable based on how well they meet Human Services needs. Legislative inertia – coming from the fact that it is easier to block action than to obtain action – makes it difficult to change the status quo.

# Primary Issues

## Our grantees and the people they serve

When it comes to human services, grantees are concerned about resources (both qualified staff and volunteers) and a source of long-term, predictable funding. At the same time, they need to show positive health outcomes — “proof” of their work. Other challenges for grantees include understanding the full impact of poverty, and achieving outcomes despite limited power as individual entities.

## My foundation and our stakeholders

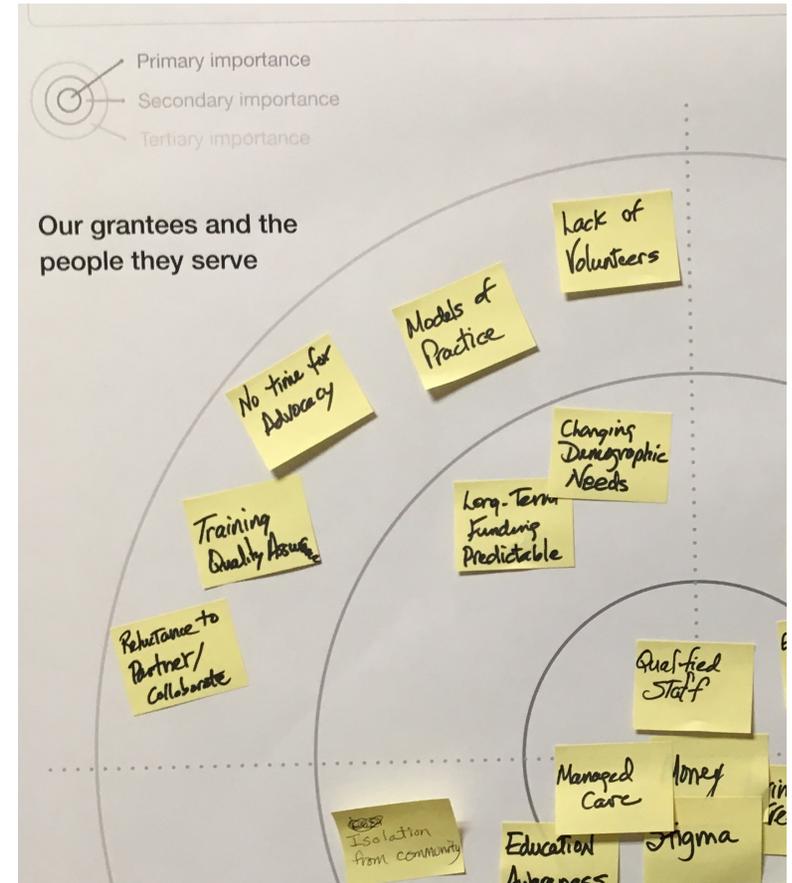
Foundations, too, are working with limited resources and must impact health outcomes, meet critical community needs, and provide increased access. These outcomes are in tension with providing efficient services and showing a positive return on investment.

## Our government / legislators

At a systems level, government is dealing with chronic underfunding and a budget deficit, while legislators are focused on electability, not increasing taxes, limiting fraud, and competing priorities. Legislators, however, must also balance the knowledge that many of their constituents have needs that are not being met by the current system: only “their conscience” keeps human services on their radar.

## Regional stakeholders

Businesses and other regional stakeholders are concerned with the return on investment, and how human services aligns with business goals. The stigma of human services (or welfare) is top of mind for regional stakeholders and others, such as legislators. Other top concerns listed include workforce recruitment and retention, education/awareness, and the challenges of managed care.



Close-up of one of three radar diagrams filled in by the group.

# Challenges

## Themes

The human services group generated more than 25 statement starters, touching on a range of themes:

- **Measuring the impact of human services.** “Making the case” to government and other stakeholders is difficult, but can be done better with an accounting of the “full costs” and ROI of human services.
- **Telling the story and combating stigma.** The group identified the need for communicating compelling stories about human services and the people who are served. This new framing or rhetorical strategy is needed to shift attitudes and help others understand that the full impact of these services takes time (more than a year).
- **Causes, not just effects.** A focus on treating the effects of poverty will not ameliorate its causes and reduce the need for these services. The perspective needs to shift.
- **Tools for others.** Equipping politicians and others with tools to make the case for human services will enable more far-reaching change.
- **Systems-level change.** Changes at the level of systemic structures could provide for human services that are manageable and cost-effective.
- **Recruiting and retaining qualified staff.** Nonprofits are challenged to recruit and retain qualified staff in an era of workforce shortage, reduced funding, and more case work.

## Top 4

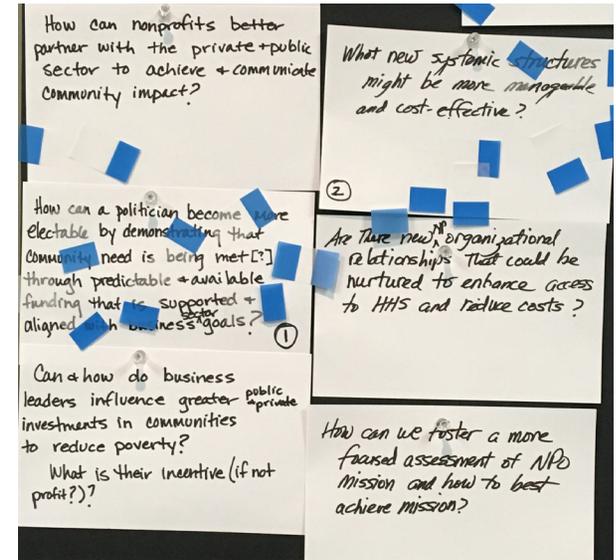
The group voted on the various statement starters, and then settled on the following four statement starters for use in the following brainstorming activity:

How can a politician become more electable by demonstrating that community need is being met?

What new systemic structures might be more manageable and cost-effective?

How do we establish a shared community standard that values human services?

How do we tackle the issue of stigma around human services so that the cuts in the name of waste, fraud, and abuse stop, and professionals in the field feel good about their work?



A subset of the challenges that were voted on by the group for further exploration.

# Addressing the Challenges

How can a politician become more electable by demonstrating that community need is being met?

## IDEAS AND THEMES

### Targeted Advocacy

Various ideas centered around advocacy opportunities, such as legislative action networks, bipartisan advocacy campaigns, and awareness campaigns. Some ideas sought to leverage the voices of those most deeply affected by a particular issue.

### Participation and Organizing

Other ideas sought to bring those affected by human services into the democratic process. Regional county-wide “participative budgeting” was one such example. Others included community cabinets, a task force on a key community issue, and the use of community organizing strategy popularized by Saul Alinsky.

### Better Measurement (ROI)

Calls for better data/statistics and an effort to “show cost savings when we fund what works, cost increases when we cut \$” point to the role of ROI in making the case for human services.

### Reform

Instead of trying to affect any one politician or candidate, many ideas targeted some notion of system-level reform, including campaign finance reform (“test an election with no fund-raising—completely govt. funded”),

efforts to encourage more and diverse people to run for office (including a pipeline of NPO leaders), term limits, and a constitutional convention.

### Awareness Campaigns

Some ideas leveraged awareness and social media platforms as a way to change the conversation. Two awareness ideas were especially specific and innovative: a “state level human services humanitarian award”, and a “write-in grade for your lawmaker on your tax return”.

### Alliances

Various alliances were suggested, such as between nonprofit leaders and government, and the creation of an “inter-locking directorate across community influencers”.

### Antagonist vs. Positive Politics

A notable divide existed between ideas intended to challenge officials/ candidates (candidate forums, “hard-hitting questions”) and those to work with them (“breakfast with collateral [printed] material”, “a state platform — not always against an issue”).

# Addressing the Challenges

What new systemic structures might be more manageable and cost-effective?

## IDEAS AND THEMES

### Reform

A few ideas focused on large-scale reform of systems explicitly — testing universal basic income, raising money for new politicians to run, holding a voter referendum, and converting from a commonwealth to a state.

### Engaging Experts and Creative Thinkers

The group identified a variety of expert communities and creative communities to help find better systemic structures: “implementation science”, organizational development experts, CCAP (County Commissioners Association of Pennsylvania) for legislative change, artist and innovator groups. Ideas need not come from within government or foundations.

### Leveraging Technology

Technology can potentially play a role in making more manageable, cost-effective, and equitable systems. For instance, why not expand EBT cards to waiver-funded services like transportation? Or provide consumers with a debit card for all of their human services needs, for them to use at will. One idea suggested funding “a cross-system central point of intake and care management”, backed by new IT. Investments in “21st century” technology are needed.

### Communities

Communities were identified as a source of new ideas: community-based research, engaging college students in community programs, and running user surveys. A “model program that focuses on sustainable communities” was also suggested. A “thematic social network” could also provide a community.

### Partner Organizations

Various partnerships were brainstormed, from the League of Women Voters, to the Chamber of Commerce and “Committee of 70”. Could foundations match job-creating structures?

# Addressing the Challenges

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How do we establish a shared community standard that values human services?

## IDEAS AND THEMES

### Community Engagement

Ideas in this column focused primarily on the value of engaged communities. Specific ideas for types of community engagements included: charrettes, town hearings, community think tanks, open-table events, film screenings (online and in person), and rallies. One particular type of community, or community value, called out was faith-based communities, and the idea of “linking religious values to community standards.” Faith groups and service clubs could host community conversations. Another idea was to incentivize community volunteerism (e.g., United Way).

### Coalitions

A variety of coalitions with different communities was suggested: schools, educational institutions, businesses. A “human service alliance - social services/faith-based/government” was one idea. Another note called for the creation of “2030-like goals with businesses and government.” These cross-sector coalitions seemed to hold the most value for establishing a shared standard that values human services.

### Awareness

Continuing the theme of awareness, some ideas mentioned campaigns, such as a “campaign for kindness”, though these ideas would be numerous in the column to the right (see “How do we tackle the issue of stigma...”). One idea was to “encourage use of services when need is honest”, which is perhaps less about awareness and more about combating stigma.

# Addressing the Challenges

How do we tackle the issue of stigma around human services so that the cuts in the name of waste, fraud, and abuse stop, and professionals in the field feel good about their work?

## IDEAS AND THEMES

### Engaging “The People We Fear”

Various allies were identified, but notably they were often called out as “the people we fear” — not only the people who have been opponents in the past, but also the minorities who are “feared” by some. Partnerships called for included government (specific legislators) and “unlikely allies” such as school boards. Less likely to be feared but perhaps still unlikely allies include journalists who could partner with community leadership organizations, associations of consumers from different backgrounds who might have commonalities, and visual designers who focus on social impact issues.

Engaging under-represented groups was another strategy identified by many. These people should be brought into the planning process.

### Storytelling / Putting a “Face” on Human Services

Ideas under this theme explored the topic of awareness through the lens of storytelling: campaigns that “tell stories of real people make things personal.” There was enthusiasm around this notion of storytelling from members of the group. The rhetorical strategy often implied was that “human services is us”, and that recipients are real people (“neighbors, families”) we can all relate to. The audience for these stories ranged from legislators (“take your legislator to the soup kitchen, shelter, or school day”) to donors (“engage donors in agency visits to see impact of grants”) to the general public (“campaign to inspire tolerance”, “teach it in schools / new curriculum”).

### Debunking “Waste, Fraud, and Abuse”

This refrain repeated itself in many ideas that called for analysis and data to help debunk the myth of “waste, fraud, and abuse.” By measuring and showing how much money went toward perceived fraud versus actual incidence of fraud, and tracking program effectiveness, we could move past these myths. Some unique ideas included a “contest for designers to present data to the community”, finding an “unexpected legislator who receives services”, and developing a “public list of everyone receiving govt. support of any kind to show pervasive use” (unrealistic perhaps, but is there the grain of a new idea?).

# Selecting an Effective Approach

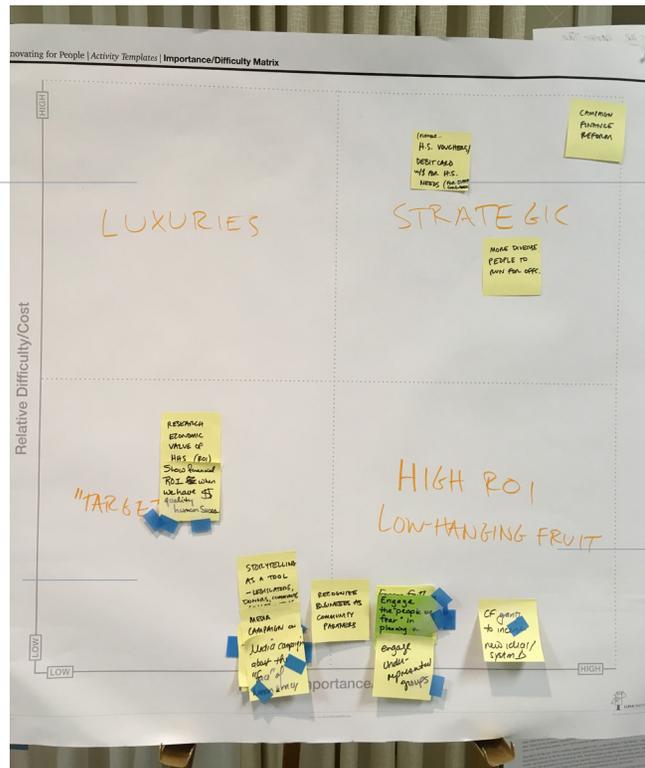
Making thoughtful decisions is challenging especially when there are many options to consider. The importance/difficulty matrix is a method for establishing priorities by ranking ideas by impact/importance to the policy area vs the difficulty to implement.

## Luxuries

- None

## Targeted

- Storytelling/media campaigns about the “face” of human services
- Researching the economic values of health and human services / showing the financial ROI of quality human services



## Strategic

- Campaign finance reform
- Flexible human services vouchers / debit cards with money for human services needs (for every consumer)
- More diverse people to run for office

## High ROI

- Community foundation grants to incentivize new ideas/system change
- Engaging “the people we fear” and under-represented groups in the process
- Recognizing businesses as community partners

Highly voted ideas plotted in terms of impact and difficulty. Ideas are shown to left and right, by quadrant.

# Approach: Coordinated Philanthropic Focus & Infrastructure

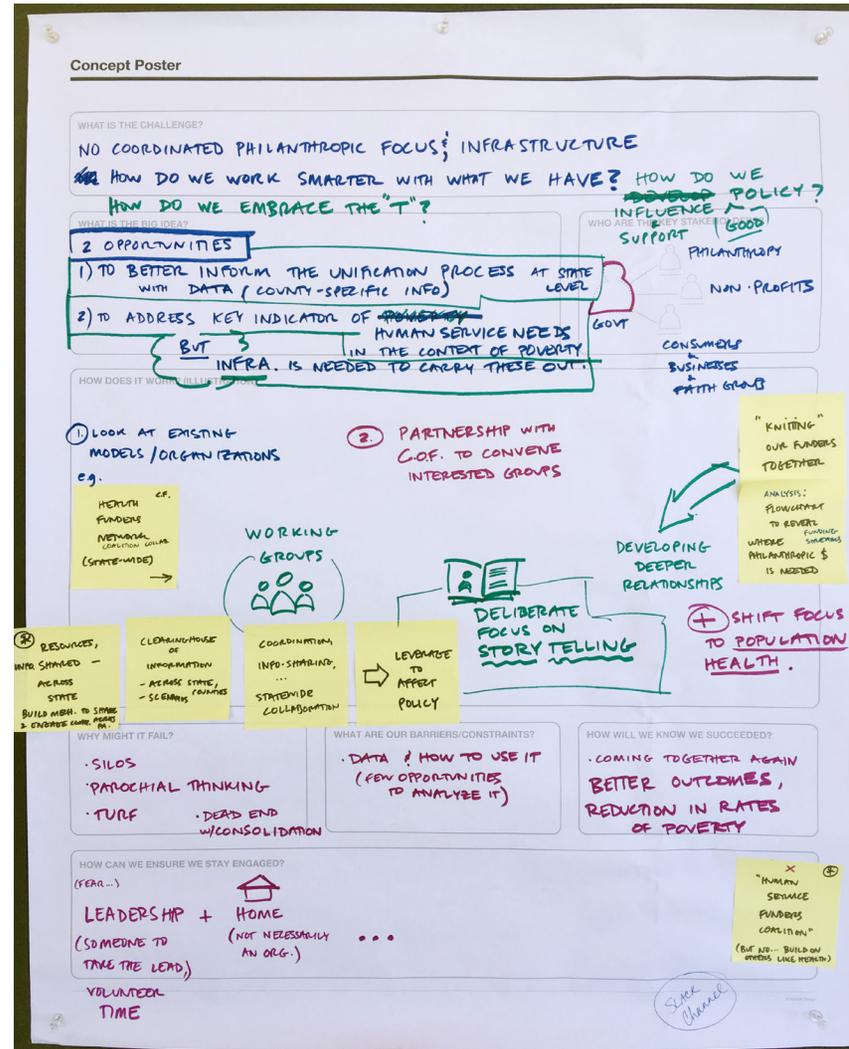
## The Big Opportunity

Upon reflecting on the previous day's output, the group felt that incremental change ("a better way to do the work") was a more realistic, useful goal than some of the far-reaching ideas. They identified a **coordinated philanthropic focus and infrastructure** as the key to responding to the following challenges:

- How do we work smarter with what we have?
- How do we embrace the "T" (the area of Pennsylvania outside of Philadelphia and Pittsburgh)?
- How do we influence and support good policy?

The two opportunities identified were:

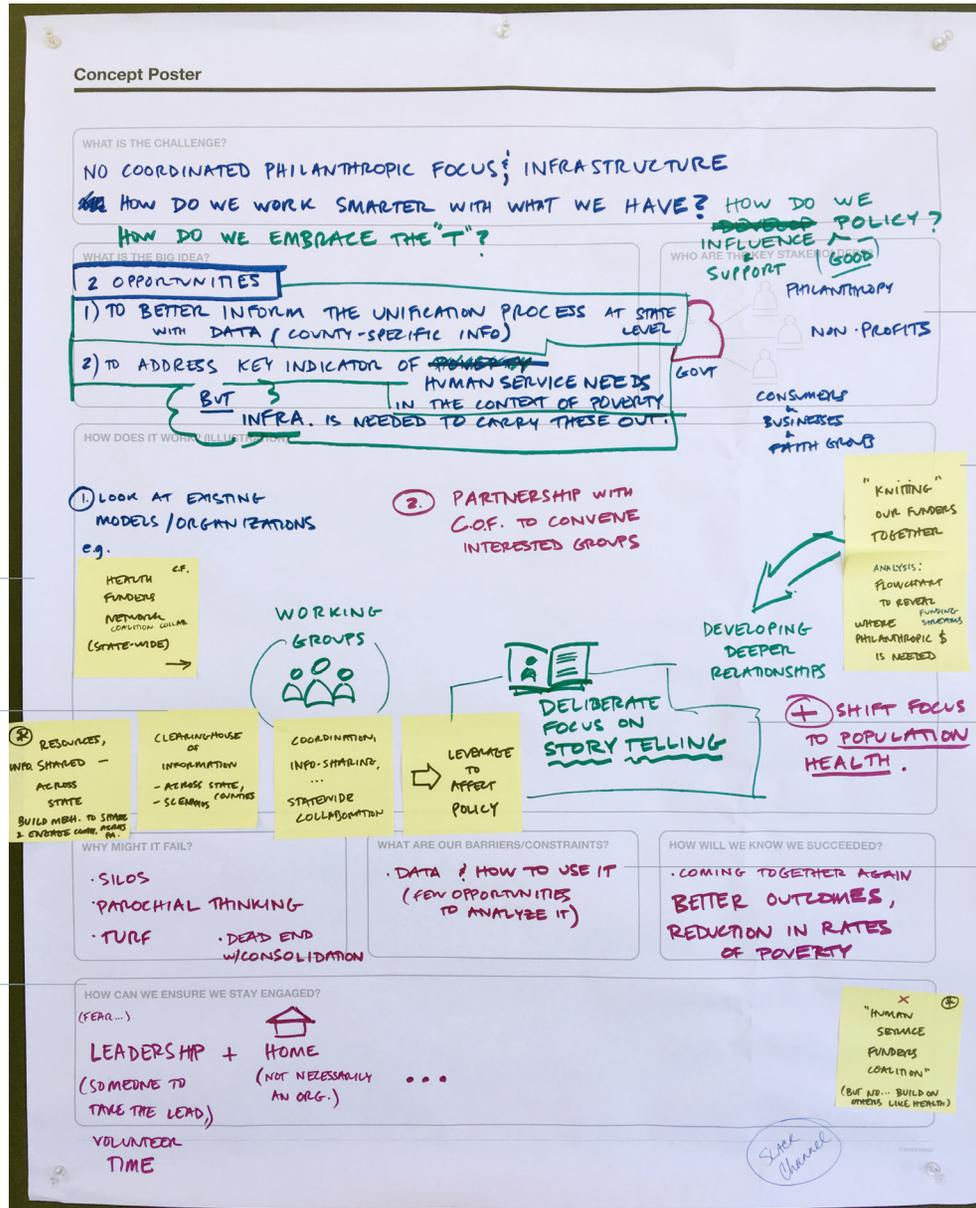
- To better inform the Pennsylvania Department of Human Services unification process<sup>1</sup> at the state level with data (county-specific information)
- To address the key indicator of human service needs in the context of poverty



The concept poster for the human services group, shown in greater detail on the following page

1. Gov. Tom Wolf has proposed the consolidation/unification of the Departments of Aging (PDA), Drug and Alcohol Programs (DDAP), Health (DOH), and Human Services (DHS).

# Approach: Coordinated Philanthropic Focus & Infrastructure (Details)



**First Steps.** The group will look at existing statewide models/orgs (like the successful Health Funders Coalition). They will then convene a meeting of interested groups, in partnership with the Council on Foundations.

**Clearinghouse of Information.**

A key component to this concept is the sharing of information and resources across the state. To do so, a mechanism is needed to engage community foundations. These resources could be leveraged to affect policy.

**Need for Leadership.** A clear leader with time must take the lead for this partnership to succeed.

**Stakeholders.** This concept engages not only the philanthropy and nonprofit communities, but also government, consumers, business, and faith groups.

**Deeper Relationships.** One requirement for success is the developing of deeper relationships between funders.

**Focus on Storytelling.** One of the methods that must be used is storytelling.

**Constraints.** The group must better develop their data-analysis skills and find time to do analysis.

# Communities in Crisis / Act 47



# Primary Issues

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Foundations, Grantees, Regional Interests, and the Government have slightly different perspectives about primary issues regarding Act 47.

All stakeholders care about financial sustainability with the goal of effectively providing high quality services.

Foundations care most about communicating a vision of quality of life.

People who are served and the grantees who serve them care most about equity, opportunity, and availability of services.

Regional stakeholders care most about attracting businesses and economic development.

Government cares most about financial stability, revenue streams, and should care (although they may not) about working across municipal boundaries.

## Foundations

Foundations care most about communicating a vision of quality of life, and assisting government and other stakeholders in providing services that have a positive impact. Yet they feel a lack of hope and may believe there are few solutions or lack confidence in the legislature. Foundations are concerned that solutions involve surface-level change when more structural change is needed.

Education of foundations' boards is needed; these issues may not be comfortable for foundations to take up. Fund holders may not be giving to a particular geographic area, and it may be unclear where funding comes from.

## People Served & Grantees

People want an equity of opportunity; to feel services are available, high-quality, and sustainable. They want to engage meaningfully with their community and not to feel abandoned. They fear negative aspects of racism. They don't want to be displaced as an outcome of development.

They worry about housing and health care availability as well as impacts on schools. They need and want to see a healthy nonprofit sector.

## Regional Stakeholders

Regional stakeholders care most about financial sustainability, and their specific concerns stem from this. They are focused on economic development and attracting businesses. They have concerns

about tax hikes that may cause people to leave (ultimately decreasing revenue).

They may care about generating interest with surrounding towns and considering how to make *all* communities care about Act 47 communities.

There are issues to be worked out regarding funding local police and the use of state police as a "free" resource (which is essentially shifting the burden to other communities).

## Government / Legislators

Legislators care about their tax base and financial stability – because that is the basis for providing high quality services. They want to make municipal funding equitable. To make limited funding go further, they will consider consolidation of duplicated services and agencies. There is a desire to work across municipal boundaries.

There may be the need to educate local officials about Act 47. There is a concern that Act 47 "doesn't work" and also that there is a stigma against communities that are under Act 47.

# Challenges

To address issues, they must be prioritized, understood, and phrased as forward-looking statements.

The most important challenges associated with Act 47 are:

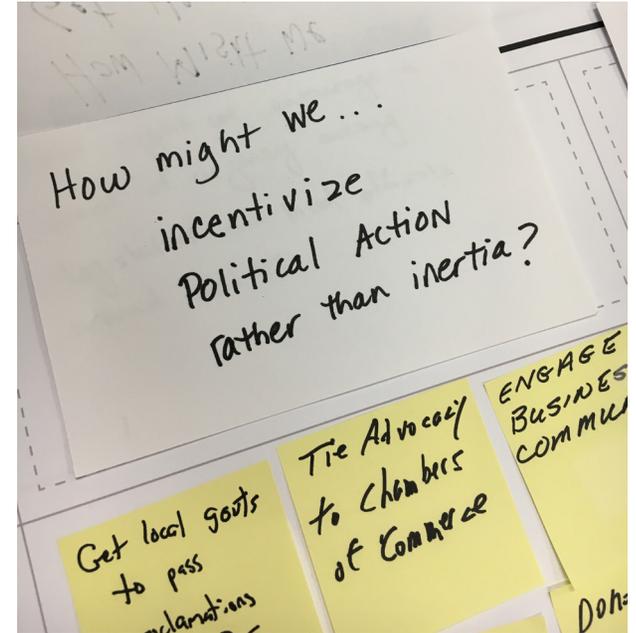
- How might we get the legislature to act to address municipal financial stability?
- How might we achieve financial stability without Act 47, to avoid it in the first place?
- How might we build awareness of the connection between municipal limits and economic sustainability?
- How might we inspire Pennsylvania to believe cities, towns, boroughs, and townships are the state’s greatest assets?

## How might we get the legislature to act to address municipal financial stability?

Action is critical, and there is fear that inertia is powerful enough to threaten progress. A sense of urgency must be created among legislators and public officials around Act 47. How might we get the legislature to take these issues of “bad law” seriously?

## How might we achieve financial stability without Act 47, to avoid it in the first place?

Act 47 must be considered as part of a larger timeline – municipalities exist pre-intervention, during intervention, and post-act-47-intervention. We must consider how to help communities avoid Act 47 oversight in the first place; to head it off before it becomes a necessity. We must also consider what it is like for communities as they “exit” Act 47 oversight, to ensure success and a low likelihood of relapse.



Example challenge statement, and some of the ideas generated to address it

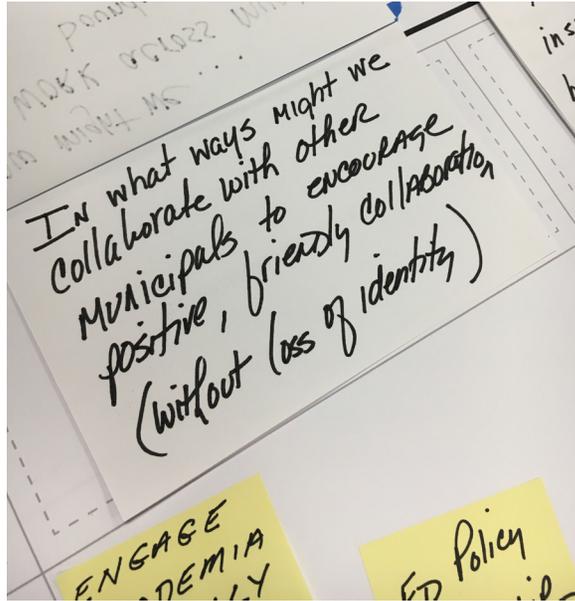
# Challenges

## How might we build awareness of the connection between municipal limits and economic sustainability?

Regional interests, like all stakeholders, care most about financial sustainability, and their specific concerns stem from this. They are focused on economic development and attracting businesses. They have concerns about tax hikes and that high taxes may cause people to leave (and ultimately decreasing tax revenue).

They may care about generating interest with surrounding towns and considering how to make neighboring communities care about Act 47 communities.

There are issues to be worked out regarding funding local police and the use of state police as a “free” resource (which is essentially shifting the burden to other communities).



Example challenge statement, and some of the ideas generated to address it

## How might we inspire Pennsylvania to believe cities, towns, boroughs, and townships are the state’s greatest assets?

Government cares about its tax base and financial stability – because that is the basis for providing high quality services. They want to make municipal funding equitable. To make limited funding go further, encourage them to consider consolidation of duplicated services and agencies. There is a desire to work across municipal boundaries.

There may be a need to educate local officials about Act 47. There is a concern that Act 47 “doesn’t work” and also that there is a stigma against communities that are under Act 47.

# Addressing the Challenges

How might we get the legislature to act to address municipal financial stability?

## IDEAS AND THEMES

### Engaging Groups

Leveraging other groups to amplify effort was a common theme. Engaging the press, using chambers of commerce and other civic groups, and engaging the business community were all proposed.

Getting local governments to pass proclamations calling for change was considered.

### Create Coalitions

Several ideas centered around using the power in numbers to create an advantage and force action. One of the more unusual activities proposed is the creation of a third political party to “save cities.” Other ideas included creating an urban PAC, creating a coalition of municipal stakeholders to contact legislators. Engaging with and leveraging donors to political campaigns was also suggested.

One suggestion was to create an organizing group that develops a grassroots advocacy strategy.

### Media

Using the media to indirectly drive the legislature was included in several suggestions. “Engage Conservative Media!” Stands out as one of the more unique ideas, but several themes emerged including use of social media.

### Creating a Narrative

A good story can bring problems to life and stimulate action. Creating a narrative of bankrupt cities as a cautionary exercise is one method for this. Using data to create a compelling narrative was also suggested. Another suggestion was to “use gaming technology to educate the public.”

### PEL Study & Other Studies

The 2017 report “The Burden of Municipal Police Costs. The Highest Expense for Some; Free for Others”, from the Pennsylvania Economy League (PEL), was cited several times: the study should be publicized and there should be follow-up. “Publish the pertinent information from the PEL study” was mentioned. In addition, several ideas proposed researching the effect of distress on businesses’ growth or death. Another idea was to draw correlations (for storytelling reasons) between distressed municipalities and distressed school districts.

# Addressing the Challenges

How might we achieve financial stability without Act 47, to avoid it in the first place?

## IDEAS AND THEMES

### Shared Services

A number of ways to address this issue include variants on shared services models. Suggestions included encouraging shared services as well as forcing consolidation of services (although the exact mechanisms of encouragement/forcing were unspecified).

Another idea put forth real monetary incentives for inter-municipal cooperation.

### Media

Although publicity and media (as well as social media) is an obvious approach to create more awareness, engaging conservative media was specifically called out as a new an/or unique approach.

### Reform

Tax reform and pension reform were specifically listed as important policy and program actions that can keep communities from Act 47, or ease their transition from Act 47.

Bond issues to fund state and local pensions was proposed as another solution to pension funding issues.

### County Government

Advancing the idea of county-level government was suggested, as were municipal mergers.

### Information Sharing

A peer-to-peer resource that allows multiple municipalities to share information, lessons learned, plans, etc. may provide value, even without actual consolidation or sharing of services.

Another proposal is to put together working groups that define a role for citizens.

### Research

A few proposals espoused research. One idea was to study other states; another proposed examining distressed school districts.

# Addressing the Challenges

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How might we build awareness of the connection between municipal limits and economic sustainability?

## IDEAS AND THEMES

### Leadership and Education

Engaging academia locally may be an important way to amplify the knowledge and experience in government.

Consider providing forums for local leaders for education, collaborative exercises, and information sharing.

Consider creating a dedicated education and policy leadership center.

### Service Sharing

As for other challenges, consolidation and service sharing should be considered. Can incentives be created and publicized? Can Pennsylvania's constitution be changed to allow legislation for consolidation?

### Power

Can second- and third-class cities be given more power to govern, such as more leeway to legislate, change laws, or tax, because they are distressed?

### Media, Publicity

Some ideas included social media and traditional media campaigns to make the argument that there are strong connections between municipal limits and economic sustainability.

### Research

A few proposals espoused research, such as studying county government in other states.

# Addressing the Challenges

How might we inspire Pennsylvania to believe cities, towns, boroughs, and townships are the state's greatest assets?

## IDEAS AND THEMES

### Involvement Business

Involving businesses can be a catalyst for inspiration and a solid starting point. One suggestion is to recruit business representatives as evangelists. Another is to engage young professionals' organizations.

### Storytelling

Storytelling can have a powerful and memorable effect. Using stories from Pennsylvania's past, as well as from other states, can help provide information and inspiration in an accessible form.

One unique idea is to distribute influential books, to create a more-informed public. Tom Hylton's book, "Save Our Land, Save Our Towns" was specifically mentioned.

### Traditional Media

Traditional media has broad reach and known success rates. One suggestion is to use a statewide, 2-year advertising campaign, TV and web, with a \$100M budget, to spread the word that cities and towns are the state's greatest assets.

### Physical Change

Above and beyond media, storytelling, and publicity, physical change may provide tangible evidence of success and a model that can be replicated. Pushing millennials' visions of walkable spaces (that is, actually create the spaces) is one possibility.

### Tax Incentives

Creating tax incentives for small business districts increases success; case studies can encourage additional development to help create a snowball effect.

### Social Media

Engaging constituents and thought leaders via social media can be cost-effective and well-targeted. One idea specifically listed engaging millennials via social media.

# Selecting an Effective Approach

Step one was delving into the Act 47 issue to understand the problem, the primary issues, and the challenges. Step two was more generative – we identified a number of ideas; ways the issues could be addressed.

Looking at the return on investment of the proposals is instructive – some may be more effective than others, give faster returns, or be more-easily-funded.

The chart at right shows the distribution of the best approaches. High Value issues are in the lower right, where their high impact and relatively low cost makes them attractive. Strategic issues are also high impact, but may take more effort and/or funding.

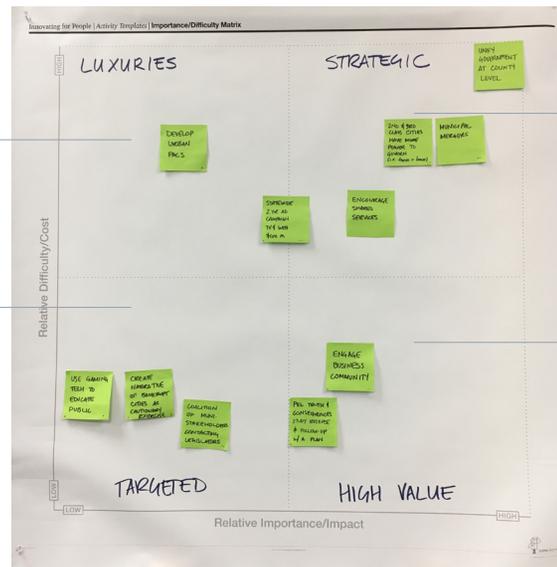
The 1-2 most attractive ideas (likely drawn from the high value or strategic quadrants) are candidates for more detailed description – these should be fleshed out further and considered for action.

## Luxuries

- Statewide 2-year ad campaign, TV & web, \$100M
- Develop urban PACs

## Targeted Proposals

- Use gaming technology to educate the public
- Create a narrative of bankrupt cities as a cautionary exercise
- Create a coalition of municipal stakeholders who contact legislators



Highly voted ideas plotted in terms of impact and difficulty. Ideas are shown to left and right, by quadrant.

## Strategic Proposals

- Unify government at the county level
- Municipal mergers
- Give second- and third-class cities more power to govern (i.e. taxes & laws)
- Encourage shared services

## High Value Proposals

- Engage the business community
- PEL Truth and Consequences Study – publicize the study and follow up with a plan to leverage the release.

# Approach: Legislative Action

## Save Our Communities

If the challenge is to save our communities, we must determine how to get **action** from the legislature that will **enable communities to prosper**.

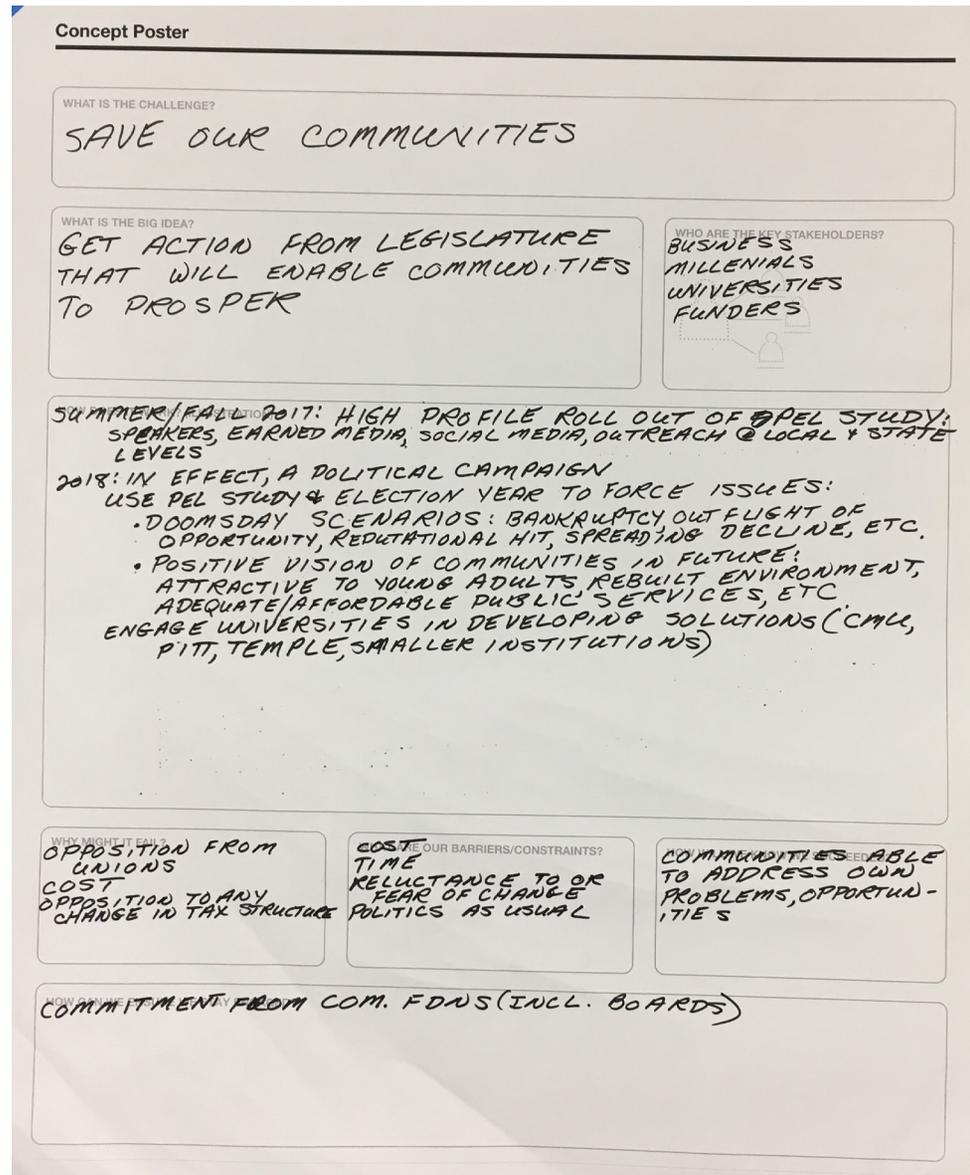
The primary stakeholders – where engaging them will make the most difference – are businesses, funders, universities, and millennials. These groups are poised to understand the issues and are biased to act.

***In effect, this is a political campaign, except the “candidate” is a big idea and a mission.***

This begins with a high-profile roll-out of the PEL study, including speakers, earned media, social media, and outreach at local and state levels.

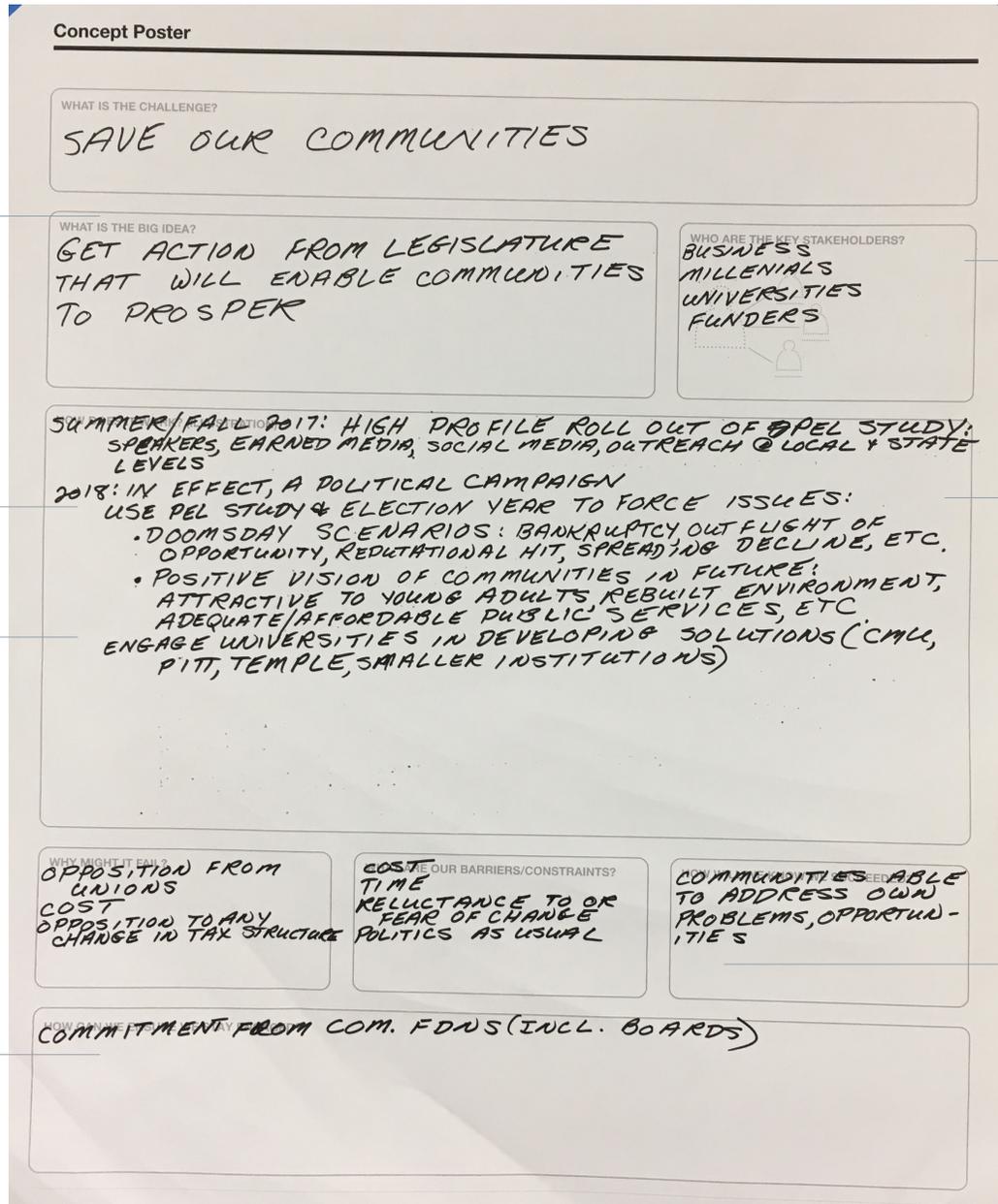
We can use the study, in an election year, to force issues. (1) We can paint doomsday scenarios as cautionary tales: bankruptcy, outflight of opportunities, reputational hits, and spreading decline. (2) Then, as contrast, we can promote a positive vision of communities in the future. Attractive to young adults, a rebuilt environment, adequate and affordable public services, and more.

We can engage universities in developing solutions (CMU, Pitt, Temple, and smaller institutions).



The “legislative action” concept poster, shown in greater detail on the following page

# Approach: Legislative Action (Details)



**Goals:** Legislative action.

**First Steps.** This all begins with a rollout of the PEL study, with sufficient fanfare and publicity.

**A “Political Campaign.”**

In effect, this is a political campaign, except the “candidate” is a big idea and a mission.

**Foundation Commitment.** This may hinge on commitment from foundations, including their boards.

**Stakeholders.** Although all citizens should benefit, certain stakeholders stand out as catalysts.

**Storytelling.** Painting both “doomsday” and positive scenarios creates memorable contrasting stories to reinforce the message.

**Constraints.** There is some opposition and reluctance to change. There are also cost and time challenges.

# Approach: “From Commonwealth to State”

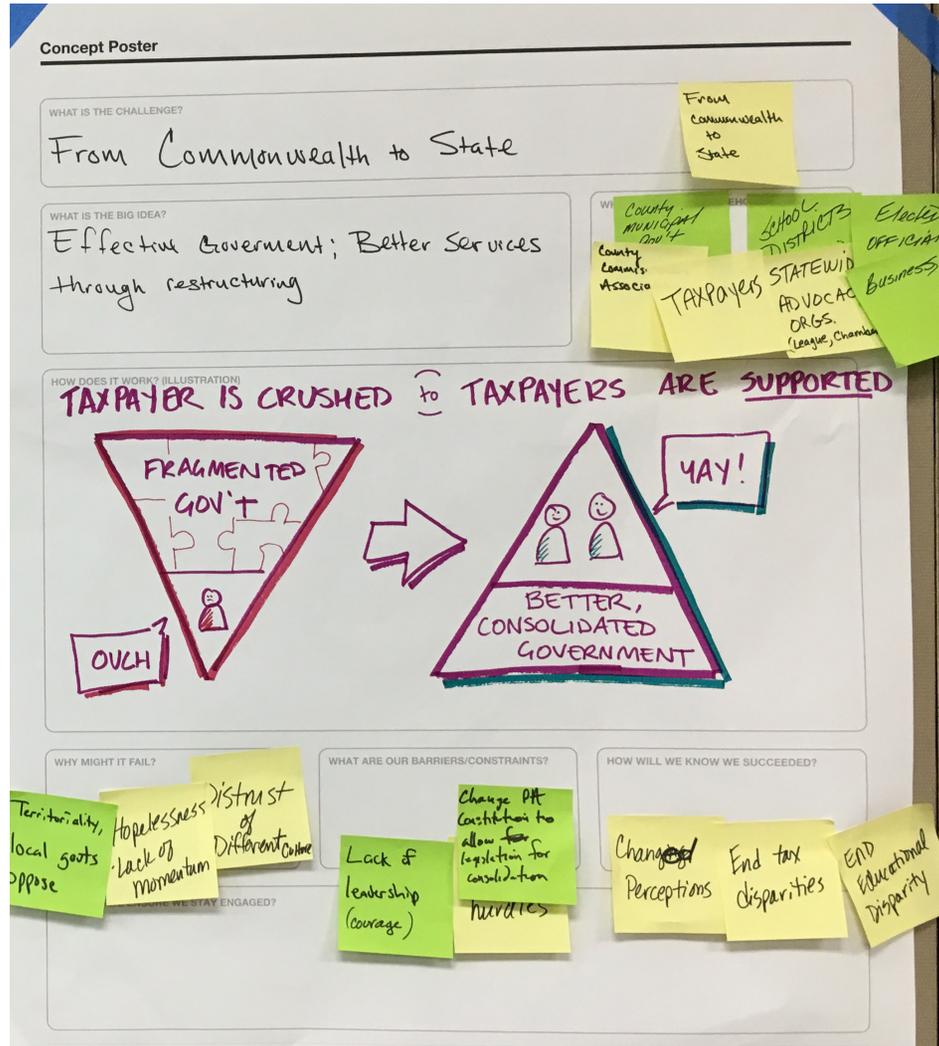
## From Commonwealth to State

When government is fragmented, money isn't spent effectively, services aren't provided evenly, and economies of scale can't be realized. Poor information and resource sharing makes for ineffective government.

Essentially, taxpayers are crushed between a tax burden and ineffective services.

The goal is to get to more effective government – better services through restructuring (consolidation and municipal collaboration). A better, consolidated government can support taxpayers and citizens, not crush them.

This model is a model of Pennsylvania as a “state” more than a “commonwealth” in the sense that government is more consolidated.



The “From Commonwealth to State” concept poster, shown in greater detail on the following page

# Approach: “From Commonwealth to State” (Details)

**Concept Poster**

WHAT IS THE CHALLENGE?  
From Commonwealth to State

WHAT IS THE BIG IDEA?  
Effective Government; Better Services through restructuring

HOW DOES IT WORK? (ILLUSTRATION)  
**TAXPAYER IS CRUSHED** to **TAXPAYERS ARE SUPPORTED**

WHY MIGHT IT FAIL?  
Territoriality, local govt oppose, Hopelessness, Lack of momentum, Distrust of Different Culture

WHAT ARE OUR BARRIERS/CONSTRAINTS?  
Lack of leadership (courage), Change PA Constitution to allow for legislation for consolidation hurdles

HOW WILL WE KNOW WE SUCCEEDED?  
Change Perceptions, End tax disparities, End Educational Disparity

Sticky notes on the poster include: 'From Commonwealth to State', 'County Municipal Gov't', 'County Councils Associa', 'SCHOOL DISTRICTS', 'Elected OFFICIALS', 'TAXPAYERS', 'STATEWIDE ADVOCACY ORGS. (League, Chamber)', 'Business', 'OUCH', 'YAY!', 'Territoriality, local govt oppose', 'Hopelessness, Lack of momentum', 'Distrust of Different Culture', 'Lack of leadership (courage)', 'Change PA Constitution to allow for legislation for consolidation hurdles', 'Change Perceptions', 'End tax disparities', 'End Educational Disparity'.

**Goals:** Provide services more efficiently through restructuring that consolidates government.

**From “Crushed” to “Supported.”**  
The ultimate goal is to move from a model of fragmented government that poorly serves citizens to a better, more consolidated government that **supports** citizens.

**Foundation Commitment.** This may hinge on commitment from foundations, including their boards.

**Stakeholders.** Primarily taxpayers. But ultimately, things should be better for everyone including school districts, county municipal government, statewide advocacy organizations, and businesses.

**Constraints.** Territoriality and distrust are the greatest barriers. A lack of courage to overcome momentum. Ultimately, the PA constitution may have to change.

**Success?** When tax disparities end, educational disparities cease, and perceptions change, we will recognize success.

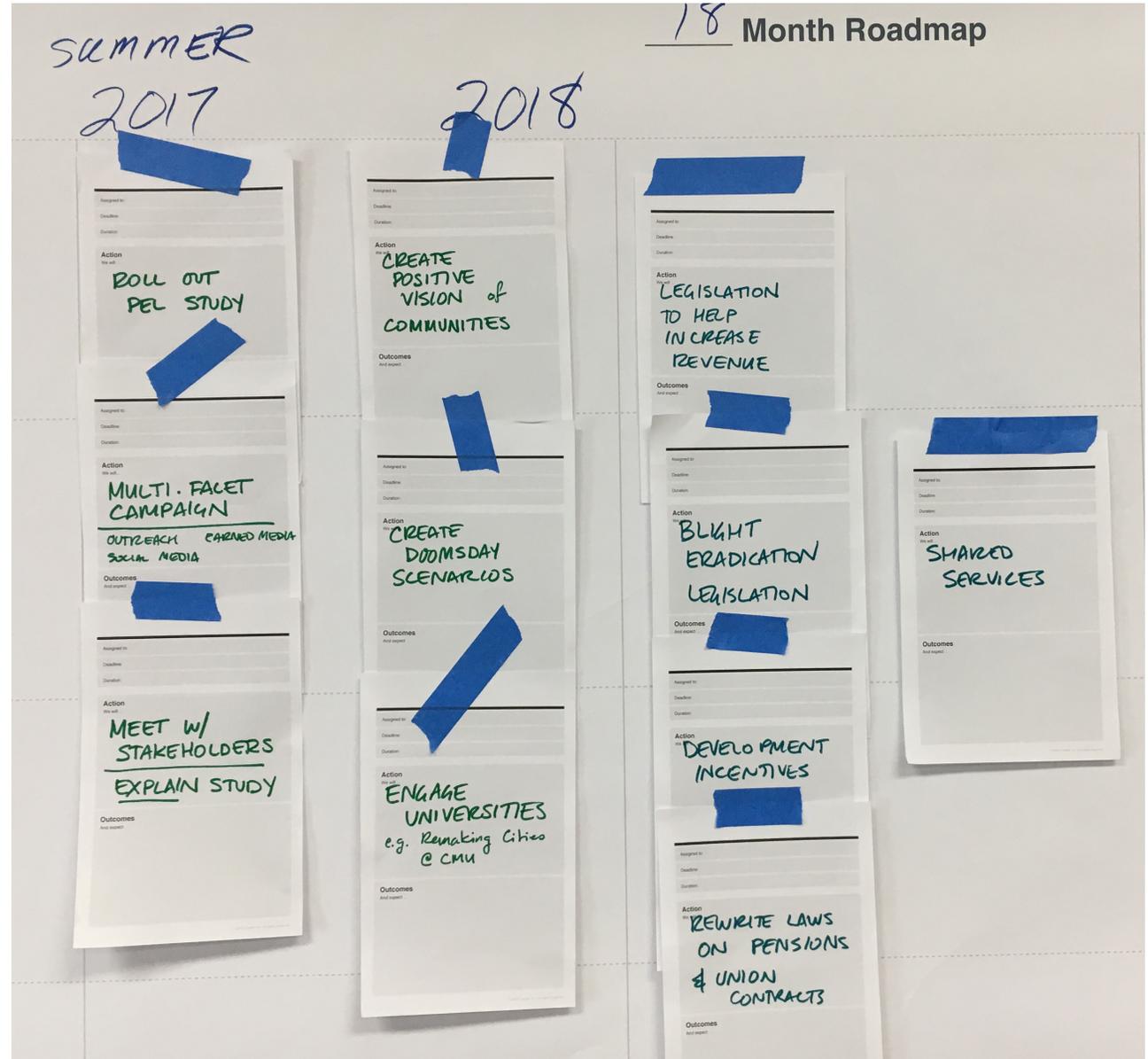
# Roadmap — A Path Forward

## An 18-Month Plan

Short term, it's obvious that the PEL study should be announced and publicized, with as much fanfare as possible. A multi-faceted publicity campaign is imagined, simultaneous with stakeholder (especially government) meetings to personally explain the story in detail.

Mid-term, the focus is on storytelling (creating a vision, illustrating that vision with scenarios) that can be used to gain support, create memorable goals, and align allies. Engaging universities may help with research, data, storytelling.

Longer term, we must focus on legislation and incentives, to create lasting change. Ultimately, we want to see municipalities sharing services in a way that makes them more efficient in providing municipal services.



# Fair Education Funding

# Problem Statement

## Overview

The Campaign for Fair Education Funding addresses the disparities and inequity that exist in Pennsylvania’s public education system. The goal of the campaign is to ensure that every student, no whatever where they live—whether in poor or wealthy communities—have access to quality education.

## The System is Broken

During the World Café presentation, the following primary factors were raised as being the root causes for the broken system:

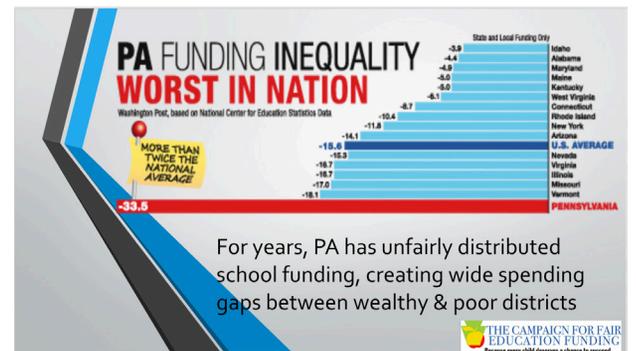
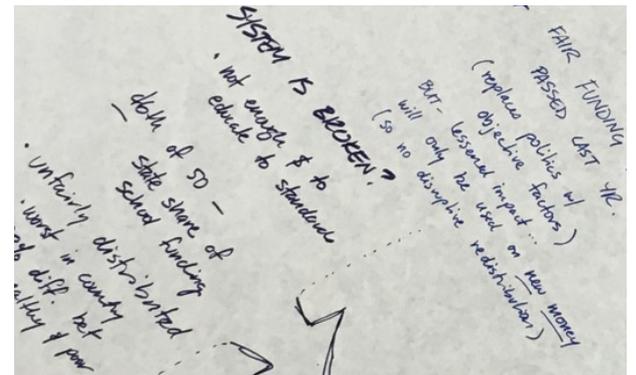
- **Lack of adequate resources**
- **School districts are faced with taking on the financial burden** since the state share of public education has not kept pace with costs
- For a long time, PA was **operating without a funding formula** which has created large spending disparities (\$78K per classroom) between poor and wealthy districts.

## Progress is being made, but it’s still not enough

In 2016, the state adopted a new fair funding formula recommended by the bipartisan Basic Education Funding Commission (BEFC), which replaces politics with objective factors for allocating state education dollars. **But the state has not acted on implementing the formula by dedicating more resources to schools or moving dollars from richer districts to poorer ones.**

The state has increased Basic Education Funding by \$400 million over the last two budget years; however, Pennsylvania is in dire need of significant funding increases to make up for the past unfairly distributed school funding, as the new formula only applies to new money.

In our breakout session, the Fair Education Team discussed ways in which to continue making progress and close the widening gap in fair education funding.



# Primary Issues

## Our grantees and the people they serve

It's important that the grantees understand the impact of funding disparities and what that disparity means across the state. In addition to building awareness, the group identified the challenge of building deeper trust in public education, engaging a broader group of stakeholders, and motivating parents to be involved.

## My foundation and our stakeholders

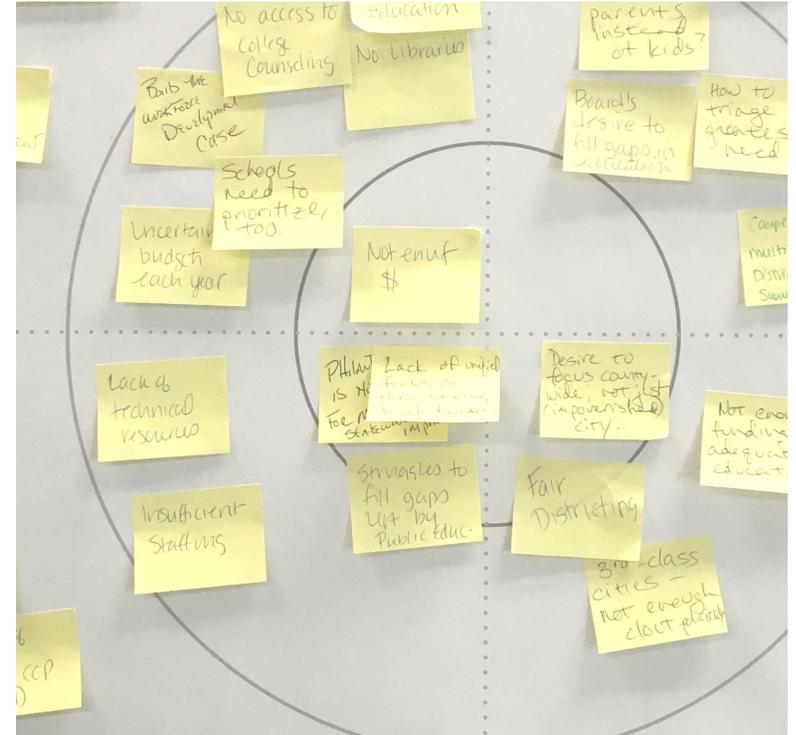
From the foundations' perspective, there's still a lot of work to be done despite the new funding formula that was recently passed. Although the formula has been approved, it has not been funded. Further, only a handful of funders are supporting the advocacy coalition working on funding the formula's implementation. As foundations work on this effort, other challenges identified were triaging the greatest need, effectively measuring the impact of their investments and sharing the results with the appropriate constituencies.

## Our government / legislators

To make the greatest impact for fair education funding, this group saw the need to overcome the legislative inertia, the lack of political will to create change. With the state's structural debt issues, it's not clear where the money will come from, which means identifying new sources of revenue. The critical need is to focus on fair education funding as a county- and statewide issue and not relegating it to impoverished cities. The refrain needs to be that this issue affects *everyone*.

## Regional stakeholders

The lack of visibility of the funding crisis in communities was seen as a key hurdle for this stakeholder group. This was seen as one of the driving factors behind the lack of unified focus on this issue by local funders. The struggle of competing priorities (e.g. immigration) was also seen as a challenge that makes it difficult for regional stakeholders to make smart decisions about where to put their dollars and how to help.



Close-up of radar diagram filled in by the group

# Challenges

The group addressed the top challenges for the Fair Education Policy area via Statement Starters, which is an approach to phrasing problem statements that invites broad exploration. The four statement starters generated by the group kept in the mind the issues and challenges identified by the What's On Your Radar activity. Teams were asked to craft provocative problem statements that invite bold and compelling ideas.

HOW MIGHT WE...

**Communicate with businesses and government that not doing anything for fair education funding will lead to economic decline in PA?**

HOW MIGHT WE...

**Collaboratively ensure that advocacy organizations have adequate and stable funding to reach citizens with info about fair education funding?**

HOW MIGHT WE...

**Connect fair education funding with fair districting?**

HOW MIGHT WE...

**Convince an entire county or region that the school funding issue affects everyone?**

# Addressing the Challenges

How might we communicate with businesses and government that not doing anything for fair education funding will lead to economic decline in PA?

## IDEAS AND THEMES

### Public Awareness Campaign

To get the message out about the inequitable funding of public education in Pennsylvania, a campaign was seen as one effective channel to elevate awareness.

### Collaboration between businesses and government leaders

Businesses need to have a seat at the table to understand how the disparities in funding impact the economy and how they can help.

### Economic Impact Studies

It goes beyond talking about the inequities, but underscoring the impact through data-driven analysis. It's about putting one's money where one's mouth is to provide evidence for the need to act and what investments need to be made.

# Addressing the Challenges

How might we collaboratively ensure that advocacy organizations have adequate and stable funding to reach citizens with info about fair education funding?

## IDEAS AND THEMES

### Increased Collaboration among Funders

Top ideas generated for this challenge statement would enable more collaboration and engagement among funders that would compel them to support the effort and fund the campaign.

- Meet with funders to discuss grant strategy
- Train school boards to lobby legislators
- Leverage funders who are entering the educational space

### Better Oversight for Education Funding

- Fund a local database to monitor education funding implementation.

The idea here is build a platform of information that can make the case for the importance of the campaign and why the funding gap needs to be addressed.

# Addressing the Challenges

How might we connect fair education funding with fair districting?

## IDEAS AND THEMES

### Addressing both issues concurrently

It is unfair that schools with higher concentrations of students from low-income families are given less funding, thereby forcing these schools to do more with less. Ideas for this challenge statement included:

- Tap into networks of newly engaged citizens from Fair Districts PA
- Sponsor grantee events to educate community on Fair Districts PA Initiative
- Online polling via social media
- Define “fair” fairly - Redefine the fair funding formula
- Help parents to understand its impact on their kids, so they can raise lobby against the disparities

# Addressing the Challenges

How might we convince an entire county or region that the school funding issue affects everyone?

## IDEAS AND THEMES

### Increasing awareness and building public support

A common refrain was heard for this problem statement as with others. Convincing people that the disparity in school funding affects everyone will require increased visibility of the issue. This means amplifying public awareness with data-informed analysis about the impact it makes not only for individuals, but businesses and communities as a whole.

- Twitter campaign
- Create interactive regional maps showing funding disparities and illustrate them
- Make economic case to chambers of commerce to make them members
- Re-examine premise of property tax. Why not sales tax?

# From Challenges to Solutions

Each team generated a wide range of ideas in a short amount of time based on the four statement starters and four enablers: Collaborators, Policies and Programs, Voices & Views, Research & Data. At the end of the activity, teams were then asked to write down one daring idea on a green sticky note. Each person was given 5 voting tabs to select their top 5 ideas that were worth pursuing. This list includes the ideas garnering the most votes by participants:



Participants voting on ideas from the creative matrices

**Create interactive map showing districts and funding inequity**



7 VOTES

**Form a statewide communication campaign that's locally customizable**



4 VOTES

**Give one class \$78K for an academic year**



7 VOTES

**Bring all PA foundation leaders to Harrisburg for a day of advocacy**



3 VOTES

**Demonstration projects exposing the inequity to parents and children**



1 VOTE

**Enable legislators to hear personal stories from kids and parents**



5 VOTES

**Develop RFP to fund advocacy orgs so funders can contribute**



2 VOTES

**Grant makers host elected officials forum**



1 VOTE

# Main Themes Across All Four Challenges

After looking across the groups' creative matrices, the following key themes were shared across them.

## THEME 1

### Build Awareness

Mobilizing the right organizations and people to act means building greater awareness of the importance of fair education funding and promoting the message that the work for this campaign is not done. Some ideas identified by the group to build awareness include:

- Create a social network among advocacy groups
- Twitter campaign about why fair funding matters
- Create huge public awareness campaign designed to demonstrate the inequity among legislators
- Funder sponsored events to showcase the connection between education and economic advantage

## THEME 2

### Convene & Engage the Right People

Building awareness is just one part of the equation. It's about bringing the right people to the table by reaching out to the community and partnering with organizations and individuals.

- Identify stakeholders and funders; empower / amplify their voice
- Tap into networks of newly engaged citizens from fair districts PA
- Help parents to understand its impact on their kids
- Speak to corporations and show them the impact of money spent.
- Funders meetings to discuss grant strategy

## THEME 3

### Capture & Visualize Compelling Data

Fair education funding is broken in Pennsylvania, but the ability to capture and visualize the data in a compelling way can augment the understanding of its impact to funders, government / legislators, and the regional community as a whole. Ideas generated included:

- Fund local database to monitor funding of education PSMS
- Create economic impact models that show the impact of school funding
- Centralize data and visualizations on school funding in one place
- Create interactive regional maps showing funding disparities

## THEME 4

### Make Bold Moves

A new paradigm is necessary to effect the change needed to close the disparities in school funding. The group talked about making bold moves to grab people's attention, such as

- When funding is stopped, all schools are closed until legislature acts
- View school districts through a county-wide lens
- No funding means no schools or football
- Demonstrate funding disparity impact in innovative ways
- Design funding solution instead of relying on legislators

# Selecting an Effective Approach

Making thoughtful decisions is challenging especially when there are many options to consider. The importance/difficulty matrix is a method for establishing priorities by ranking ideas by impact/importance to the policy area vs the difficulty to implement.

## Luxuries

- None identified

## Low Hanging Fruit

- Give one class \$78K for an academic year
- Create interactive map showing districts and funding inequity
- Grant makers host elected officials forum
- Bring all PA foundation leaders to Harrisburg for a day of advocacy



Highly voted ideas plotted in terms of impact and difficulty. Ideas are shown to left and right, by quadrant.

## Strategic

- Demonstration projects exposing the inequity to parents and children
- Enable legislators to hear personal stories from kids and parents
- Create interactive map showing districts and funding inequity
- Share results of RAND study in PA showing impact

## High Value

- Develop an RFP to fund advocacy organizations so funders can contribute including:
  - Collaboratively fund advocacy activities
  - Fund existing efforts at a higher level

# Approach: Convening People to Identify Gaps

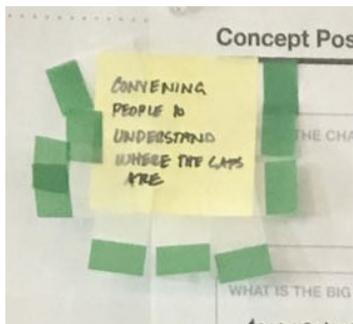
We asked the team to vote on the most impactful idea on the importance/difficulty matrix. After recapping the previous day's activities, the Fair Education Funding team felt that there was an important idea that, while inherent in the other ideas, needed to be called out more explicitly.

That idea focused on convening funders to understand where the gaps are related to fair education funding. The team unanimously agreed to move forward with this idea for their concept poster.

A concept poster is an effective way to promote an idea and galvanize interest for its development. The purpose is to get others to not only understand the concept, but also to embrace it.



“Convening People to Identify Gaps” concept poster, shown in greater detail on the following page



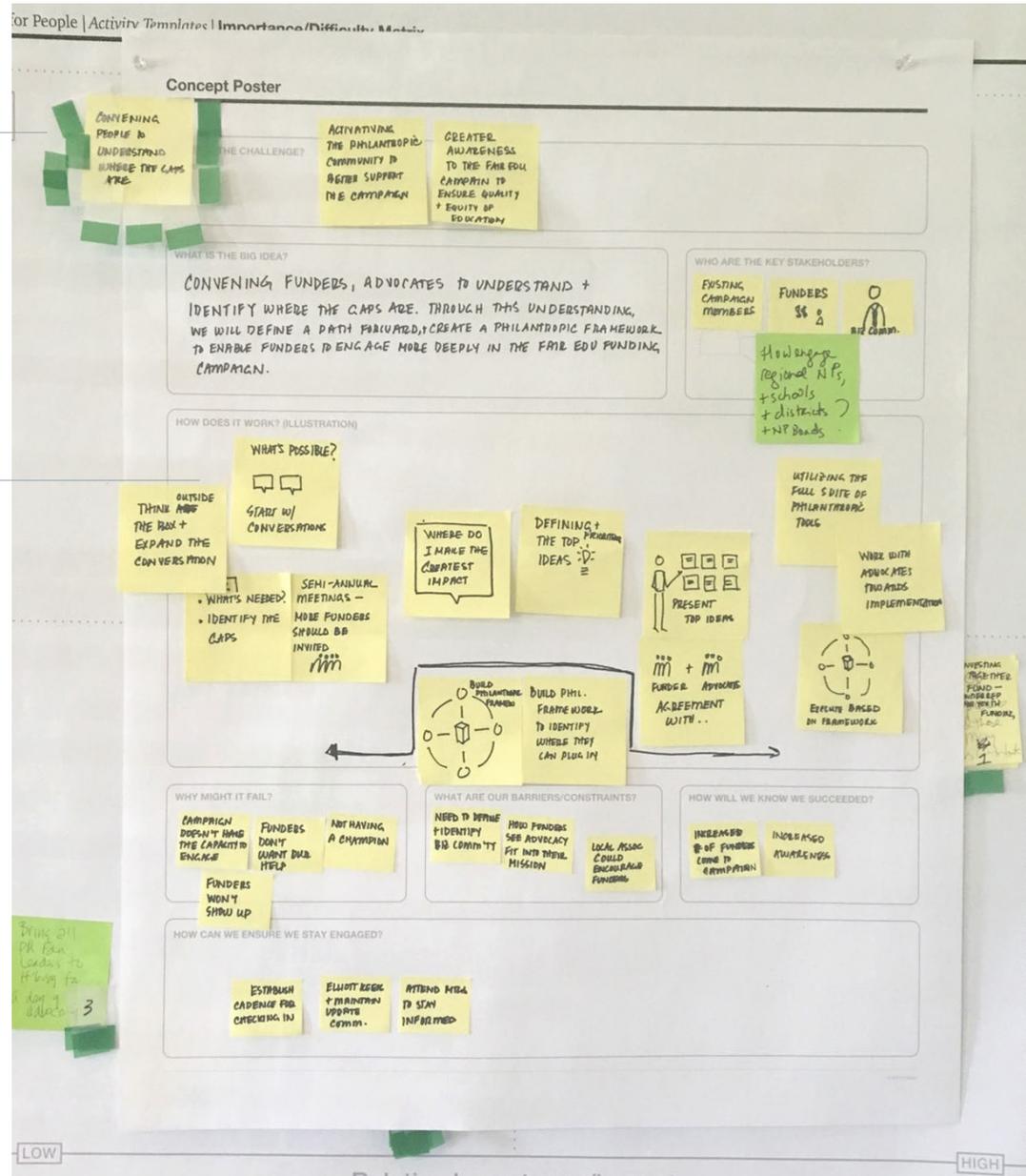
# Approach: Convening People to Identify Gaps (Details)

## The Challenge

- Activate the philanthropic community to better support the campaign
- Greater awareness to the fair educating campaign to ensure quality and equity of education

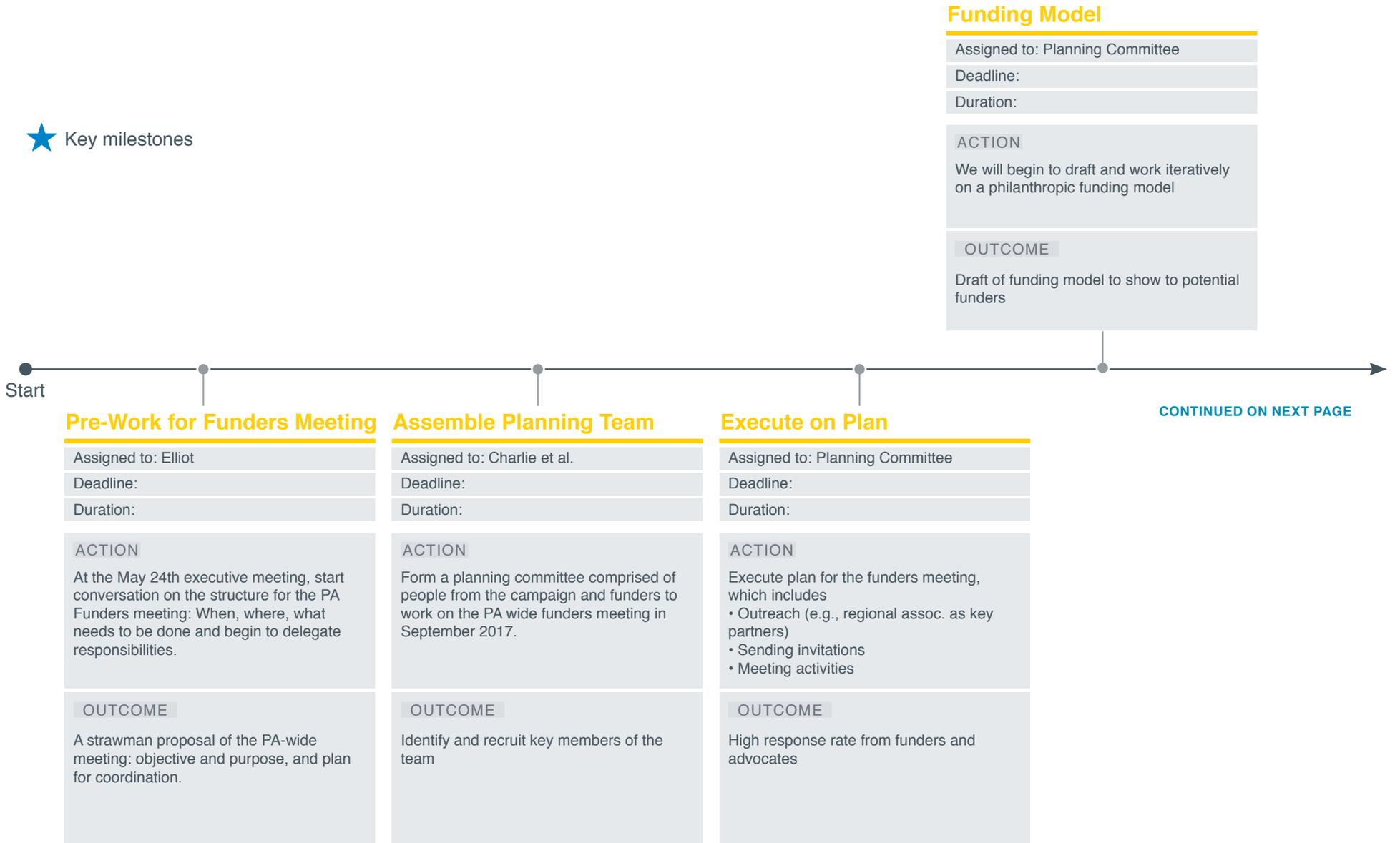
## The Big Idea

Convening funders and advocates to understand and identify where the gaps are. Once we've established an understanding, we will define a path forward by creating a philanthropic framework that will enable funders to engage more deeply in implementing the Fair Education funding campaign.



# Roadmap: A Path Forward

★ Key milestones



# Roadmap: A Path Forward

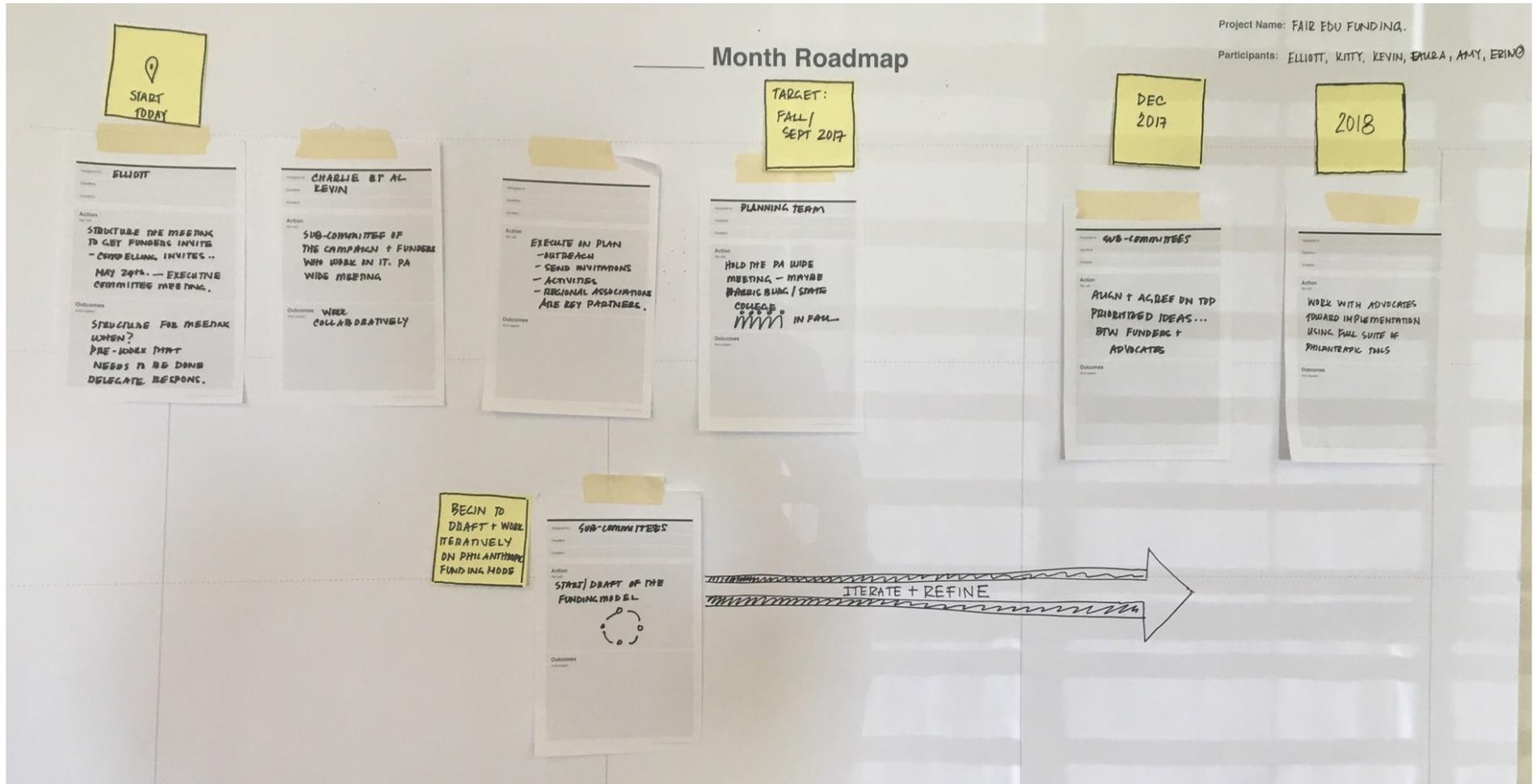


CONTINUED FROM PRECEDING PAGE

Iterate & Refine Funding Model

# Roadmap: A Path Forward

The original roadmap sketch is shown below, and reproduced digitally on the two preceding pages.



# The Opioid Crisis

# Problem Statement

## Overview

The number of overdose deaths from opioids has skyrocketed in Pennsylvania. The 2015 statewide drug overdose death rate in Pennsylvania was 26 per 100,000 people, up from 21.9 per 100,000 in 2014. The national drug overdose death rate in 2014 (most recent available) was 14.7 per 100,000 people, according to the CDC.

## How we got here

80% of heroin users in the U.S. previously used prescription pain killers. Opioid prescriptions were up 188% from 1991-2011 in the U.S. Mexican production of heroin increased 525% from 2004-2009. Each day, 580 people use heroin for the first time.

## What's being done

- Guidelines:** for opioid prescriptions
- Naloxone:** increased access
- Warm handoffs:** urge treatment
- Treatment:** Centers of Excellence

Also, state legislation is being considered to allow involuntary commitment after overdoses.

## But more needed

- Education:** reduce stigma
- Local assistance:** support human services, law enforcement, health care
- State advocacy:** connect with other states, tackle treatment challenges
- Federal advocacy:** stop illegal drugs



# Primary Issues

## Our grantees and the people they serve

With regard to the opioid crisis, the perspective of grantees was believed to primarily revolve around the care and help they were able to provide. What was deemed essential was a warm handoff. However, this is in jeopardy from lack of services and limited staff, funding, and resources. The stigma attached to opioid addiction was seen as an inhibitor to care from the perspective of all stakeholders.

## My foundation and our stakeholders

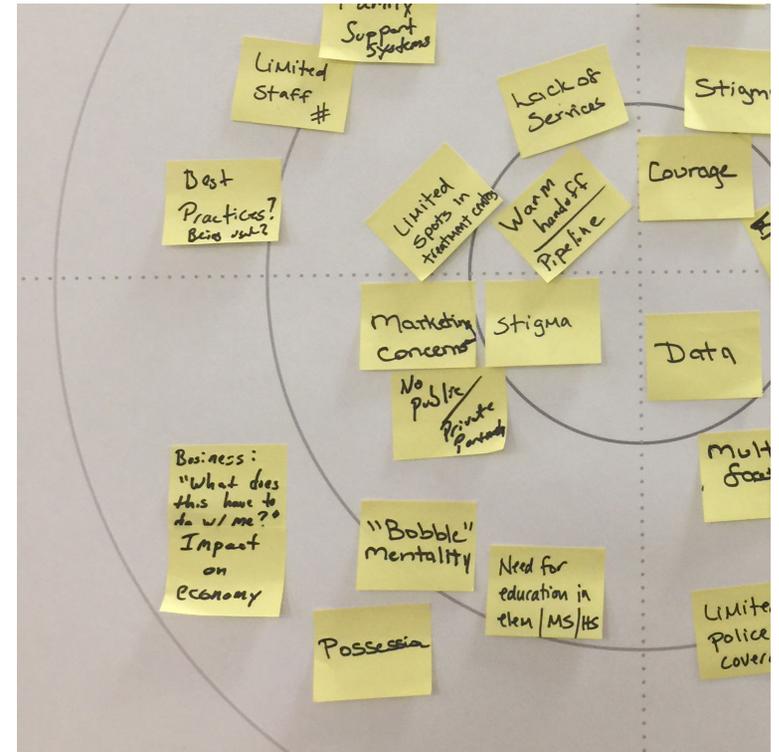
For foundations, there was a need to affirm that addressing the opioid crisis in Pennsylvania was a proper role for foundations to play. However, people believed that foundations needed courage to step into this issue and assert their plans. In order to do this, more education about the crisis, information about success rates and evidence-based methods, and empathy were deemed critical incentives.

## Our government / legislators

Government's concern is with collecting and providing consistent data to the public and to funding agencies to document key indicators of the crisis. Currently data about opioids is fragmented and inconsistent across the state. Additionally, the lack of funding and the need to stretch public dollars were cited.

## Regional stakeholders

Businesses and other regional stakeholders were not seen to be as involved in or aware of the impact to them from the opioid crisis. Awareness campaigns and information about its impact could address this as well as promote public/private partnerships to address the crisis.



Close-up of one of two radar diagrams filled in by the group

# Challenges

## Themes

The Opioid breakout team generated roughly eight statement starters between the two groups. The themes included:

- **Reducing the stigma associated with opioid addiction.** The stigma that exists around this topic is a huge barrier to participating whether through funding, proposing legislation, or partnering for a cause.
- **Collecting consistent data documenting the crisis.** The group identified the need for standardized and consistent data to be collected, disseminated and used across the state. Currently, there is not enough data being collected on opioids, there is a general lack of awareness of what data exists, and the data that does exist is not standardized across Pennsylvania communities.
- **Acknowledging the long-term focus.** Important for the group was the understanding that successfully addressing opioid addiction required a long-term approach.
- **Strengthening the recovery pipeline and filling gaps in coverage.** A warm handoff for opioid addicts throughout the recovery pipeline is a goal but gaps in care exist and treatment is inconsistent.
- **Willingness of funding agencies and partners to step into a stronger leadership role.** Foundations and their partners can take the lead in directing resources towards this crisis. The hesitance to more directly commit is believed to be related to the need for more validation either from evidence-based data, success rates, or best practices of others in this effort.

## Top 4 Themes Expressed as Statement Starters

The group voted on the various statement starters, and then settled on the following four statement starters for use in the following brainstorming activity:

How might we eliminate stigmatic thinking so that we can engage regional stakeholders?

How might we instill courage in the funding community to validate the use of resources?

How might we strengthen the long-term pipeline to recovery?

How might we influence legislators to standardize reporting mechanisms?



# Addressing the Challenges

How might we eliminate stigmatic thinking so that we can engage regional stakeholders?

## IDEAS AND THEMES

### Media Campaigns

Quite a few ideas focused on generating better understanding through coordinated media campaigns focusing on stories of addiction or family narratives to demonstrate how the crisis affects everyone.

- “Work with local media to develop community campaign”
- “Work with media outlets to educate”
- “Use media to promote warm handoff”
- “Capture addicts’ stories”
- “Stamp Out Stigma campaign”

### Education about the Crisis

Other educational ideas were also put forth, such as

- “Educational luncheons sponsored by chambers of commerce”
- “College professors/psychologists lectures about the affects of stigma”
- “Education by mental health providers about treatment”
- “Townhall meetings with providers to increase awareness”
- “Arts-based campaign to raise awareness”
- “Research what works in other communities”
- “Promote Doctor-to-Doctor conversations”

# Addressing the Challenges

How might we instill courage in the funding community to validate the use of resources?

## IDEAS AND THEMES

### Engaging the Board

A number of ideas centered on the need for foundation boards to be educated about the epidemic.

- “Bring in outside facilitator to engage board”
- “Have subject matter experts brought in to educate board”
- “Get a speaker for the board meeting to talk about the state of epidemic”
- “Promote area efforts via social media”

### Boards and Foundations Working Together

Various ways for foundations to work together were also suggested.

- “Foundations educating each other about how and why”
- “Sector groups (CoF) holding workshops on courageous grantmaking”
- “Successful foundations publishing their research data”
- “Giving circles of donors”
- “Show what our local dollars leveraged together can do in this area”

### Funding Opportunities

Several ideas outlined specific opportunities foundations could get behind or fund.

- “Sponsor a study to prove that treatment is superior to incarceration”
- “Fund mentorship or coaching programs to work one-on-one with those in need of recovery”
- “Create a field of interest fund devoted to the epidemic”
- “Hospitals to collect and publicize their data”
- “Start small and grow”

# Addressing the Challenges

How might we strengthen the long-term pipeline to recovery?

## IDEAS AND THEMES

### Collaborate with Care Providers

A number of ideas centered on educating those who come into contact with addicts about the benefits of a warm handoff throughout the recovery pipeline.

- “Go to the experts to understand the pipeline”
- “Law enforcement education program on warm handoffs”
- “Get treatment education from medical community”

### Support Support Groups

The care and work done by support groups surfaced in a few ideas.

- “Build care coalitions in communities without groups”
- “Start/fund aftercare support groups”
- “Support recovery communities, promote easy access to support groups”
- “Encourage groups like ‘Not One More’ to speak out”
- “Require collaboration among grants applicants to be eligible for funding”

### Identify Pipeline Resources

The need to identify and map resources throughout the recovery pipeline resonated in a few ideas.

- “Identify current service providers/resources and barriers to providing services to consumers”
- “Develop and update a resource guide”
- “Identify/map who is working on these issues”
- “Research proven programs outside of PA”
- “Ask those addicted as well as service providers, ‘what do you need?’”
- “Promote PA 211” [a statewide collaborative and phone number for health and human service information for Pennsylvanians]

### Aggregate Data

A couple of ideas touched on the need for data.

- “Define success”
- “Get data on proven success”
- “Enable county commission to aggregate data”

# Addressing the Challenges

How might we influence legislators to standardize reporting mechanisms?

## IDEAS AND THEMES

### Map Data Resources

Many ideas centered on the need to first map data that existed and where there were data holes.

- “Sponsor a university study on what we have and what we need”
- “Identify data holes”
- “State level data collection through arrest, prosecution and treatment center records”
- “Community mapping to focus on communities’ data”
- “Identify challenges by talking with experts in the field”
- “Use schools of public health to research and report”

### Advocate for Data

The need to advocate for more data and more consistent data surfaced in a few ideas.

- “Organize a unified voice that communicates what data is needed”
- “Explain why data is important for funding requirements”
- “Be a voice for advocacy”
- “Advocate for legislation that will specify what data must be reported” [and how]
- “Identify legislators in districts where the problem is improving”
- “Invite legislators to town hall meetings”
- “Host a statewide data summit”
- “Create a community collaborative to meet with elected officials”

# Selecting an Effective Approach

The opioid breakout group plotted highest-voted ideas on the impact/difficulty matrix.

## Luxuries

- Develop and update an app similar to Big Burgh

## Targeted

- Partner with local legislator to lead the charge for change and talk to colleagues in the field
- Approve funding for research to develop evidence-based programs
- Speak with a unified voice
- Everyone be part of a common solution



Highly voted ideas plotted in terms of impact and difficulty. Ideas are shown to left and right, by quadrant.

## Strategic

- Sue the drug makers to create fund to strengthen the pipeline
- Create more treatment centers of excellence
- Identify the gaps in the pipeline and prioritize funding for gaps in service
- Collect consistent, valid data and determine effective strategies to present to community at large
- Use data to collectively impact common indicators to create social change

## High ROI

- Look at what other communities are doing, identify successful systems in providing long-term recovery access to services
- Create strategic grant-making opportunity around the epidemic

# Approach: Collaboration through Collective Data

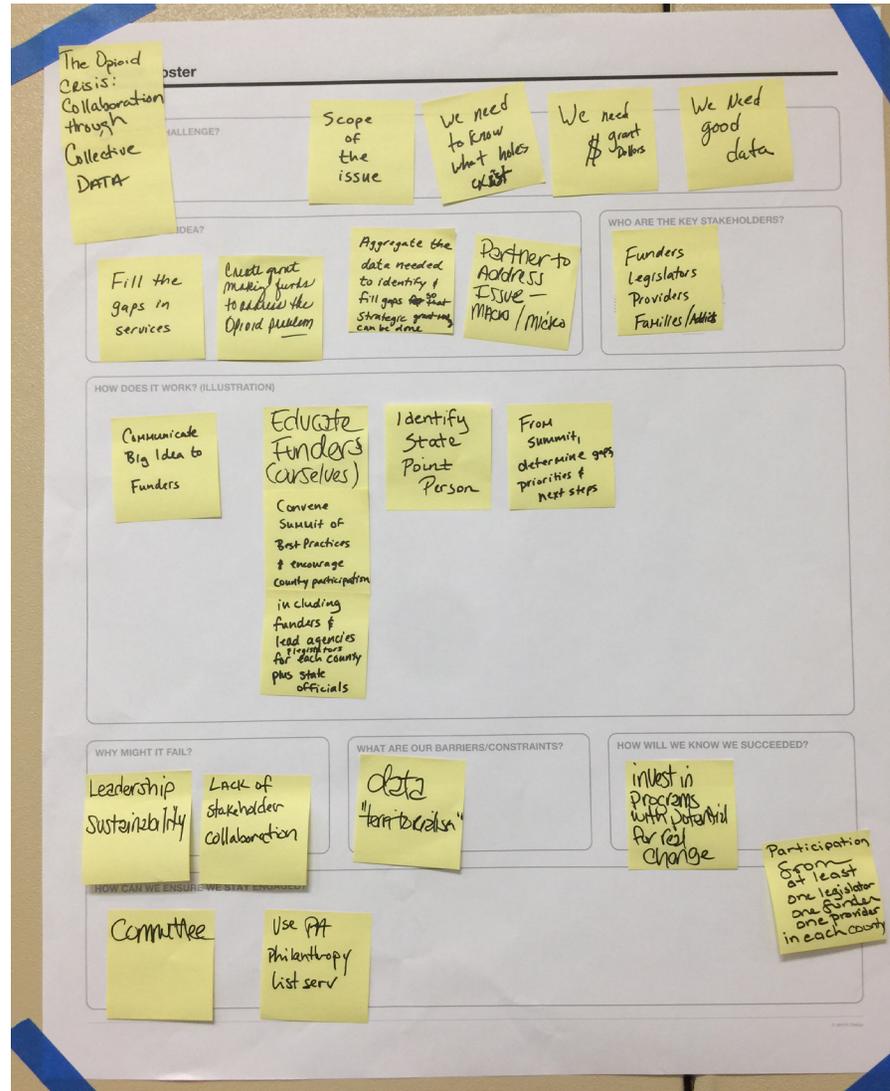
## The Big Opportunity

The group agreed that they could have the biggest impact by focusing on what they are best suited to do - **collaborative funding opportunities using aggregated and consistent data**. Ultimately, by pooling their resources and using standardized data, they would be able to fund solutions to filling in the gaps that exist in serving the needs of the addicted. The challenges they identified in addressing this issue are:

- How can we have an impact when the scope of this issue is so big?
- How can we fund opportunities when we don't even know what holes currently exist?
- The need for both grant dollars and reliable data

The big ideas in this concept involve:

- Partnering to address macro and micro issues
- Aggregating the data needed to identify and fill gaps so that strategic grant-making can be done
- Collectively create grant-making funds to address the opioid problem
- Ultimately, fill the gaps in service



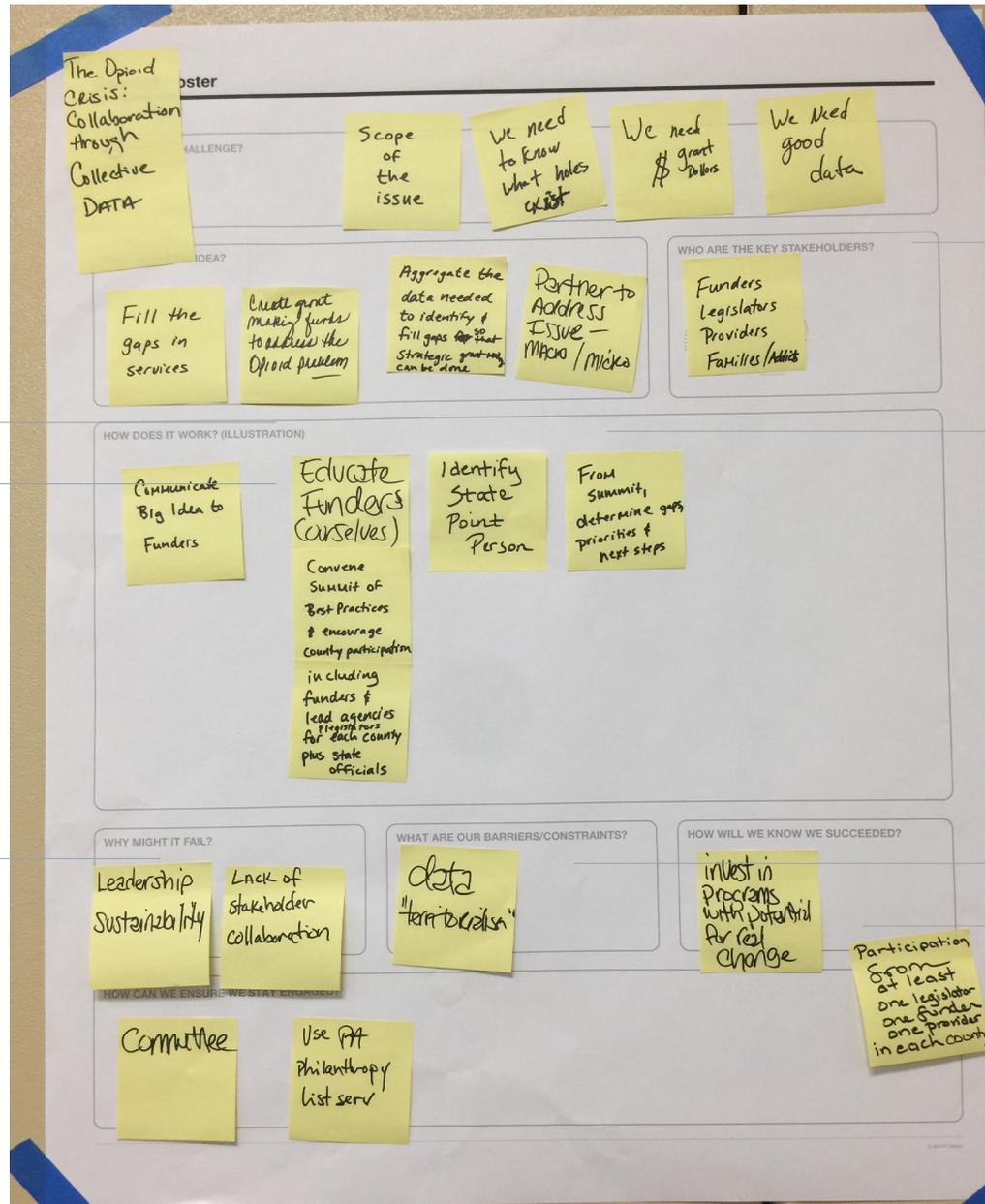
Concept poster shown in greater detail on the following page

# Approach: Collaboration through Collective Data (Details)

**First Steps.** To do this, the group decided that they needed to first communicate their big idea to funders. They would also need to educate themselves and other funders on the issue.

**Statewide Summit.** Key to implementing the big idea is the statewide summit. Here the funders and political leverage would be educated about best practices. The summit would encourage county by county participation from funders, lead agencies and legislators.

**Need for Leadership and Collaboration.** There must be leadership sustainability on this issue. Without it, the concept would fail. Similarly, without stakeholder collaboration, the concept won't have the resources it needs.



**Stakeholders.** This concept engages the funding community, legislators, care providers, and families and addicts.

**After Summit Action.** The summit gathers the key people in one place to determine action and responsibilities. From the summit a state point person is appointed, gaps and next steps are determined.

**Constraints.** Data "territorialism" is identified as the biggest barrier or constraint.

**Success.** Big picture, if funders are able to invest in programs with potential for real change, they will know that their concept has succeeded. More tactically, if funders are able to get participation from at least one legislator, one funder and one provider in each county, they will have succeeded.

## THE OPIOID CRISIS

# Roadmap

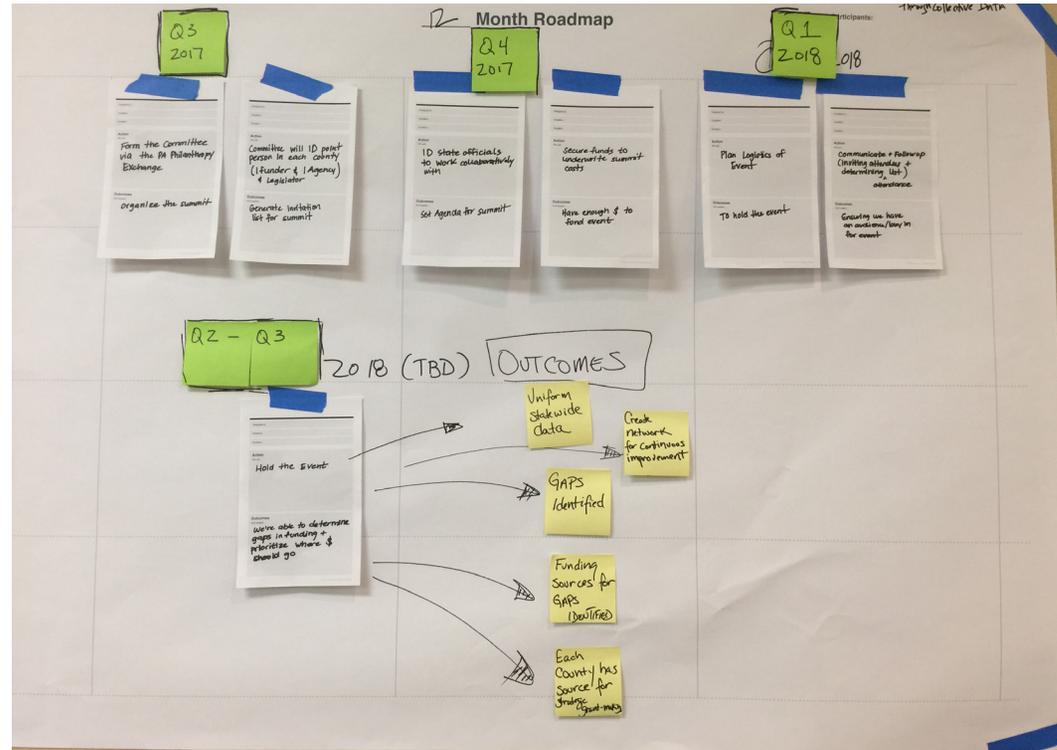
### The 12-Month Roadmap.

The group agreed upon a 12-month roadmap to implementing the concept of a statewide summit on addressing the opioid crisis. The summit would be held in the spring or summer of 2018. The months leading up to that would be spent in preparation for the summit.

### Critical Summit

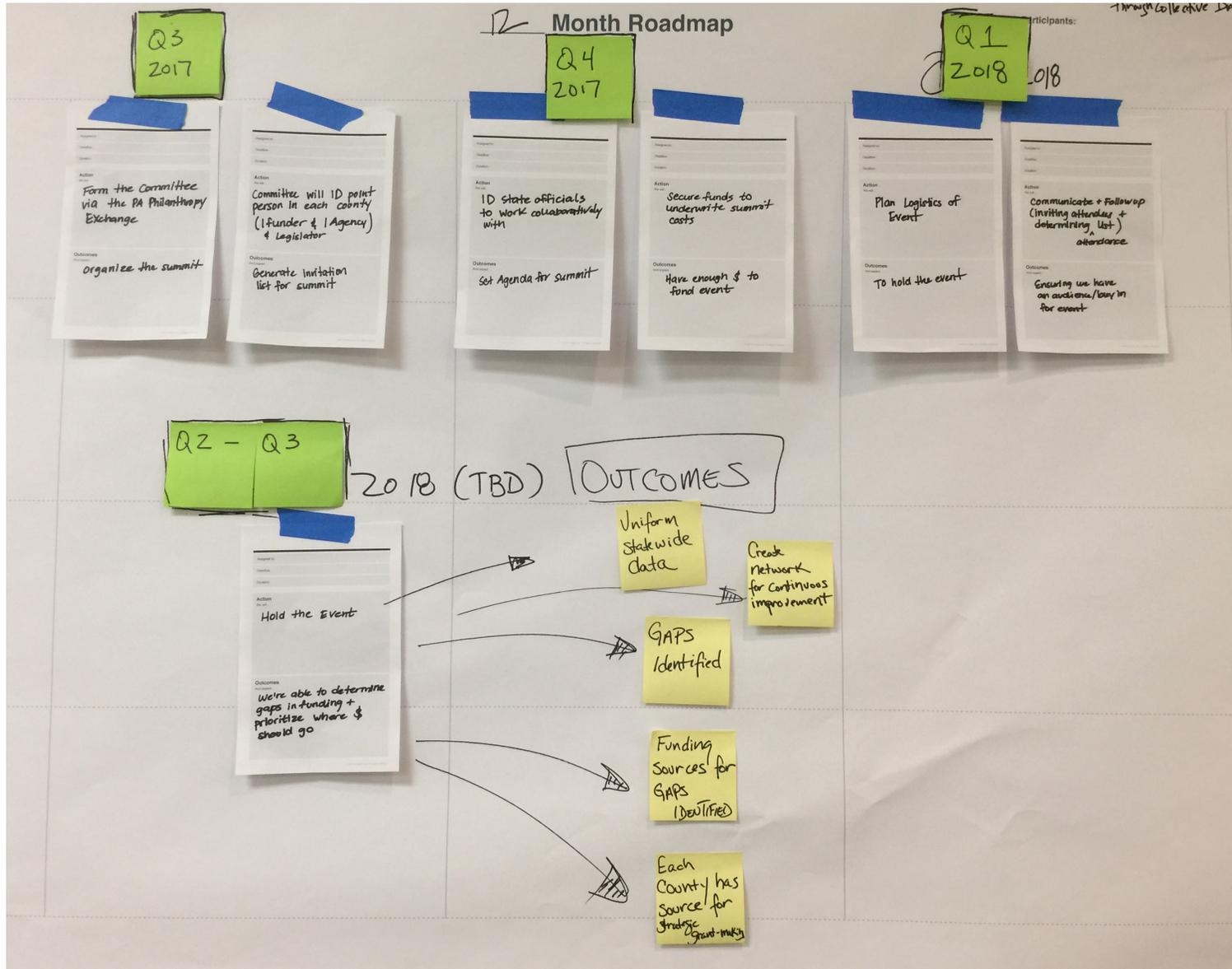
**Outcomes.** The group hopes that outcomes from the summit would include:

- Uniform state-wide data
- Gaps in service identified
- Funding sources for gaps identified
- Each Pennsylvania county has a source for grant-making on this issue
- A network is created dedicated to continuous improvement of data



Roadmap shown in greater detail on the following page

# Roadmap (Details)



**Q3 2017.** Action 1: Form the Collaborative Data and Funding committee through the PA Philanthropy Exchange. Outcome: Organize the summit.

Action 2: Committee identifies point persons in each county (one funder, one legislator and one agency) Outcome: Generate invitation list for the summit

**Q4 2017.** Action 3: Identify state officials to work collaboratively with on this issue and for summit. Outcome: Set agenda for the summit.

Action 4: Secure funds to underwrite the summit costs. Outcome: Have enough money to fund the event.

**Q1 2018.** Action 5: Plan logistics of the event. Outcome: Hold the event.

Action 6: Communicate and follow-up (inviting attendees and determining attendance list). Outcome: Ensuring we have an audience/buy-in for the event.

**Q2 or Q3 2018.** Action 7: Hold the event. Outcome: We are able to determine gaps in funding and to prioritize where money should go.

