

# Sustainability Through Transitions: A Case Study of the Michigan Governor's Office of Foundation Liaison

A partnership between the State of Michigan  
and the Council of Michigan Foundations

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## Dorothy A. Johnson Center for Philanthropy

Established in 1992, the Dorothy A. Johnson Center for Philanthropy is an academic center within the College of Community and Public Service at Grand Valley State University. We conduct research, provide professional and organizational development, and create and share tools for nonprofits, foundations, and others seeking to transform their communities for the public good.

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## Executive Summary

For over 16 years, the Governor's Office of Foundation Liaison (OFL) has served Michigan by facilitating public-private partnerships that benefit children and families across the state. These partnerships have developed in the areas of prenatal to postsecondary education, economic and workforce development, health, and land use. The OFL — the first office of its kind in the nation — was founded as a collaboration between the philanthropic sector and state government. Since 2003, the OFL has received continuous support from philanthropy, including over 20 foundations, and has served at the pleasure of three governors: Democratic Governor Jennifer Granholm (2003–2011), Republican Governor Rick Snyder (2011–2019), and now, Democratic Governor Gretchen Whitmer (2019–).

The OFL has successfully transitioned across three governors of different political parties. This longevity is the result of deliberate planning by the OFL staff and its funders. The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University, the OFL's long-time evaluator, developed this case study to explore the strategies used to support these transitions. The evaluators interviewed key stakeholders, observed Foundation Liaison Advisory Committee meetings, and analyzed historical documents, such as past evaluations and meeting minutes. Twenty-four individuals were interviewed, including past and current senior representatives from governor executive offices, the Council of Michigan Foundations, the Foundation Liaison Advisory Committee, the Michigan Department of Corrections, the Michigan Department of Education, the Michigan Department of Health and Human Services, and the Michigan Department of Technology, Management, and Budget.

What emerged from the data is that the OFL has successfully sustained itself over the course of three gubernatorial administration transitions through a multi-faceted and nuanced approach that includes:

- The OFL's collaborative founding story that demonstrates how the Office itself was forged from a strong public-private partnership;
- The OFL's unique structure and experienced staff that enhance its capacity to effectively manage public-private relations;
- The OFL's ongoing evaluation process that provides evidence of the Office's value and impact;
- The OFL's cross-sector and cross-administration relationships that are cultivated through the Office's nonpartisan, people-oriented stance and strengthen as the OFL evolves;
- The OFL's consistent and constant presence and institutional knowledge base that are maintained across term-limited administrations; and
- The OFL's distinctive ability to facilitate, mediate, connect, and translate across public and private sectors thanks to a unique combination of the staff's skills and instinct that are rooted in their deep knowledge of both sectors.

Each of these factors has informed the OFL's transition tactics that include:

- Acquiring an understanding of an administration's style to better inform the Office's communication and outreach strategies;
- Developing and maintaining nonpartisan relationships and partnerships with executive team members and state agency staff;
- Managing government and philanthropic expectations to facilitate partnership opportunities;
- Connecting with gubernatorial candidates and transition teams during the campaign to inform them about the Office and its successes;
- Serving as a trusted nonpartisan resource throughout transitions and demonstrating the value that the OFL can add to the executive office; and
- Being a willing, strategic, flexible, adaptable, and patient ally in aligning foundation and gubernatorial priorities.

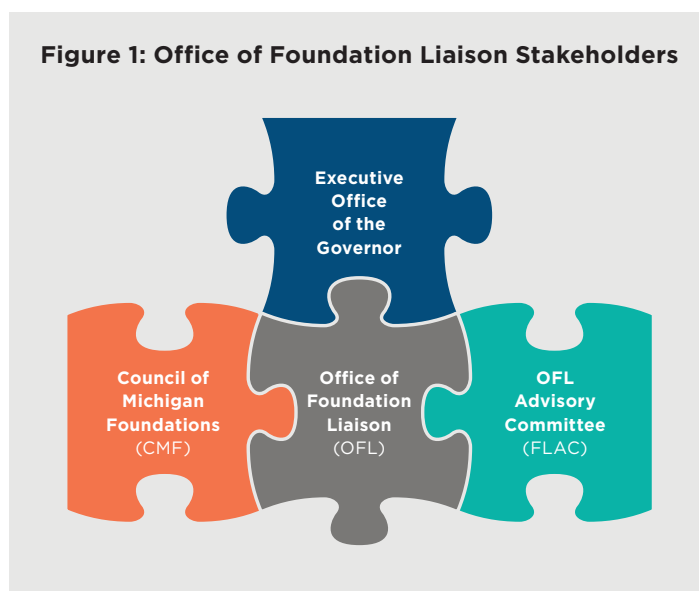
The OFL has not only persisted but also evolved over the course of three gubernatorial administrations, allowing it to work more efficiently and effectively with both the public and private sectors.

## Introduction

Founded in 2003 as a collaboration between the State of Michigan and philanthropic organizations, the Governor's Office of Foundation Liaison (OFL) — the first of its kind in the nation — serves as an executive branch-level nonpartisan connector between Michigan's public and philanthropic sectors. To achieve its mission, the OFL focuses on three core objectives:

1. **Promote mutual understanding and collaboration** between state government and foundations, and identify strategic opportunities for partnership;
2. **Serve as a trusted source of data, information, and dialogue** about programs, policy impacts, and policy and implementation options; and
3. **Facilitate strategic joint investments** that will improve outcomes for Michigan and its residents.

Since its inception, the OFL has held hundreds of partnership conversations and meetings and has helped to align tens of millions of dollars in foundation and government investments aimed at improving the lives of Michigan's children and families through reforms in prenatal to postsecondary education, economic and workforce development, health, and land use. Over the last 16 years, more than 20 foundations have provided financial support for the OFL, and the state government has provided an office. The foundation liaison, Karen Aldridge-Eason, a loaned executive from the Charles Stewart Mott Foundation, leads the OFL. Aldridge-Eason is supported by two Council of Michigan Foundation (CMF) employees: associate foundation liaison, Stephen Arellano and office assistant, Michelle Danaj.



The Foundation Liaison Advisory Committee (FLAC), comprised of representatives from contributing funders, the Michigan Nonprofit Association, the Governor's executive office, and CMF (the OFL's fiduciary agent), provides guidance to the Office. The FLAC also sets the OFL's focus areas every year in coordination with the executive office of the Governor, ensuring alignment between foundation and state government priorities. These priorities are revisited regularly and adjusted based on conversations with the Governor's executive team.

The OFL has facilitated successful public-private partnerships with continuous support from the philanthropic community and three different gubernatorial administrations, serving at the pleasure of Democratic Governor Jennifer Granholm (2003–2011), Republican Governor Rick Snyder (2011–2019), and now, Democratic Governor Gretchen Whitmer (2019–). With each administration change, the OFL had to demonstrate its worth to the incoming governor and their administration as well as the philanthropic community. The Office is only able to continue its work if it can transition from one administration to the next.

Using data collected through interviews with key stakeholders, regular conversations with the OFL staff, historical document reviews, and Advisory Committee meeting observations, this case study first provides a brief history of the Office then explores what has made the OFL successful through administration transitions.

Twenty-four individuals were interviewed from January to April 2019. Interviewees were identified by the OFL staff as having had some interaction with the OFL during one or more of the gubernatorial administrations. These semi-structured interviews lasted 30–60 minutes each and included past and current senior representatives from:

- Council of Michigan Foundations
- Foundation Liaison Advisory Committee
- Governor Jennifer Granholm’s Executive Team
- Governor Rick Snyder’s Executive Team
- Governor Gretchen Whitmer’s Executive Team
- Michigan Department of Corrections
- Michigan Department of Education
- Michigan Department of Health and Human Services
- Michigan Department of Technology, Management, and Budget



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## **An Office Created to Bring Public and Private Partners Together to Benefit Michigan**

The OFL’s success and longevity over the past 16 years can be traced to its origin. Created in 2003, the Office started as a collaboration with then-Governor Granholm and members of the philanthropic community. While philanthropic leaders had maintained long-standing relationships with Michigan governors for decades, the Office was the first official entity in the executive branch formed to support the development and growth of initiatives through public-private partnerships.

### **From Idea to Reality: Finding a Way to Collaborate during Difficult Times**

The early 2000s brought economic instability to Michigan and little relief from chronic challenges. The nation was struggling through a recession spurred, in part, by the burst of the dot-com bubble. Many foundations lost a third of their endowments and had to layoff staff, some for the very first time. Michigan’s Big Three automotive companies — Ford, Chrysler, and General Motors — grappled to stay afloat and layoffs were widespread. Michigan families faced especially difficult times as the Big Three’s downward spiral affected not only auto workers, but also every business that supported the industry, including local stores, dealerships, and automotive suppliers.



While philanthropic leaders had maintained long-standing relationships with Michigan governors for decades, the OFL was the first official entity in the executive branch formed to support the development and growth of state initiatives through public-private partnerships.

Given this troubling economic climate, there was a growing understanding among state government officials and philanthropic leaders that they could not tackle all of Michigan's issues alone or through narrow partnerships any longer. Out of these challenging times, an idea for a broader collaboration emerged in 2002, spearheaded by David Egner, then-president and CEO of the Hudson-Webber Foundation, and the late C. David Campbell, former president of the McGregor Fund. Inspired by a similar position that had been a successful part of former Detroit Mayor Dennis Archer's office, Egner and Campbell pitched an idea for a state-level liaison to newly elected Governor Granholm.

Seeing the potential of what strategic public-private partnerships could mean for Michigan, Governor Granholm supported the idea and in 2003 signed the memoranda of understanding that brought the OFL into being with

backing from CMF, serving as the Office's fiscal sponsor. These partners paved a path for the OFL's strategic networking efforts, and grounded the Office in the promise that both public and private sectors would commit to working together to improve the lives of all Michiganders.

### **Striving for Focus and Nonpartisanship: Structuring and Staffing the OFL**

From the beginning, it was important to structure the OFL in a way that would allow it to focus on its founding mission: to develop strategic partnerships between philanthropy and state government to achieve positive outcomes for Michigan residents. Through a series of conversations and negotiations between the Governor's office, CMF, and leaders in the philanthropic community, four key understandings arose:

1. The OFL needs to remain neutral in a partisan environment.
2. The OFL needs staff that has knowledge and experience in the areas of government, philanthropy, and grantmaking.
3. The OFL needs to be positioned in the executive office in a way that facilitates regular access to connections and conversations.
4. The OFL needs stakeholders to understand that it functions as a partnership office, not as a fundraising entity.

Originally, the Office was launched with philanthropic support and the idea that the state would assume all its costs after a couple years. Early on, however, lead funders determined that the Office would be most effective if it was independently funded so that it could retain a higher degree of neutrality and nonpartisanship. As many stakeholders stated in interviews, the OFL's effectiveness stems, in part, from its ability to mediate along ideological divides and bring stakeholders together around a common, underlying desire to help Michigan's children and families. Interview participants noted that the OFL has continually emphasized that it is focused on the issues — shared public-private priorities — rather than partisan politics.



To ensure that the OFL would serve as a nonpartisan entity at the intersection of state government and philanthropy, the Governor's office, CMF, and the Office's lead funders — including the Hudson-Webber Foundation, the W.K. Kellogg Foundation, the McGregor Fund, the Charles Stewart Mott Foundation, the Kresge Foundation, and the Skillman Foundation — set out to establish the OFL's core objectives and working guidelines. The result of these discussions included:

- The formation of the Advisory Committee;
- Three memoranda of understanding between CMF, the Governor's office, and the Charles Stewart Mott Foundation; and
- The selection of Karen Aldridge-Eason as the OFL's first foundation liaison.

The Advisory Committee was created to serve as a bridge between the Governor's administration, the OFL, and the philanthropic community. The memoranda defined the Office's roles and responsibilities and made clear that Aldridge-Eason would serve as a loaned executive from the Charles Stewart Mott Foundation.

Aldridge-Eason, appointed to the OFL on March 24, 2003, was identified as a top candidate due to her significant cross-sector experience. Aldridge-Eason had served as a program director for the Charles Stewart Mott Foundation, and managed over \$10 million in investments for Flint area initiatives. She also held roles in government, including with the City of Flint and the Michigan Department of Management and Budget.

During the OFL's formation, Governor Granholm offered her ongoing support. According to involved stakeholders, the Governor spoke highly of Aldridge-Eason to her staff, informed her cabinet about the unique partnership role of the OFL, and encouraged her staff to regularly share projects with the Office. The Governor also ensured that the OFL would be well-integrated into her administration from the beginning, assigning the OFL a cabinet-level position and locating the office on the same floor as her strategic policy team. Decisions made during the OFL's early stages — from its initial conception to its cabinet-level positioning within the Governor's administration — laid the groundwork for the Office's ability to facilitate partnerships across sectors and gubernatorial administrations.

### **Creating the OFL: Four Essential Ingredients**

1. The OFL needs to remain neutral in a partisan environment.
2. The OFL needs staff that has knowledge and experience in the areas of government, philanthropy, and grantmaking.
3. The OFL needs to be positioned in the executive office in a way that facilitates regular access to connections and conversations.
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## The Process of Transitioning Across Administrations


While the OFL's founding story laid the groundwork, the Office's sustainability has been solidified by its ongoing nonpartisan approach and the ability to achieve results. Although the Office's transition strategy has evolved over time, there are underlying tactics that have carried the OFL through administrations, regardless of the governor's party affiliation. According to stakeholders, these tactics include building cross-sector understanding; managing relationships and priority projects effectively during an administration's tenure; establishing connections early on and throughout an administration's transition period; and re-positioning the Office as a valuable partner once a new administration is established.

### Pre-Transition: Setting the Stage for Success

The OFL, its funders, and the Advisory Committee understand that the OFL staff are guests in the executive office and that the OFL's existence is not a given. During each transition, the OFL must prioritize its work with the current administration. During this time, the OFL concentrates on developing an understanding of the administration's style; building relationships and offering its expertise and skills to stakeholders; and serving as both a connector and mediator between the public and private sectors.

### Understanding an Administration's Style

Every administration brings its own style to the executive office, and it is the OFL's responsibility to understand it in order to partner more effectively on shared priorities and projects. Regular informal and formal conversations paired with observations of an administration's structural and communication tendencies help the OFL determine how administration staff members and agency leadership will make use of the Office's knowledge, expertise, skills, and connections and work with the philanthropic community.



The OFL and its partners have observed that the OFL's physical proximity to the governor's strategic policy team, and the opportunity to access regular, high-level meetings can affect the way the OFL conducts its work.

Based on these interactions, the OFL and its partners have observed that the OFL's physical proximity to the governor's strategic policy team, and the opportunity to access regular, high-level meetings can affect the way the OFL conducts its work. During Governor Granholm's administration, for example, the OFL was housed on the same floor as the governor's strategic policy team (the third floor) and attended monthly cabinet meetings as an official cabinet member. This proximity was "really important," according to an Advisory Committee representative, as it "sent a strong message that this Office was part of the administration and relied on the administration."

Being in this top-level position allowed the OFL to have regular interactions with administration staff and agency heads and to recognize both gaps and opportunities in shared priority areas. As a cabinet member, the OFL identified important issues as they emerged and could work quickly to bring philanthropic partners to the table for conversations. What's more, cabinet colleagues learned that they could count on the OFL for knowledge about the foundation community. According to a member of Governor Granholm's executive team, cabinet leaders saw the Office as a strong partner and would even "stand in line to get an audience with the OFL."

Once the OFL transitioned into Governor Snyder's administration, several stylistic changes became apparent. The OFL remained a member of the executive team but was no longer a part of the Governor's cabinet. What's more, the OFL's office space was eventually moved to a different floor during the Governor's second term, limiting the staff's ability to casually bump into policy team members and have informal, but essential relationship-building conversations. This shift in management style was a challenge; the Office had to adopt a different approach to the partnership.

The OFL understood that it would need to adjust its interactions with Governor Snyder's administration to accommodate the new governor's style. An important way that the OFL gained greater access within the Snyder Administration was through long-standing personal relationships between Aldridge-Eason and department leadership and between CMF's then-president Rob Collier and Snyder Administration members. Further developing these relationships proved fruitful as government staff put their trust and faith in the OFL's ability to facilitate difficult conversations. The Flint Water Crisis, in particular, tested the OFL's skill in facilitating these discussions.

As the OFL transitioned out of Snyder Administration and into the Whitmer Administration, early interactions with executive team members indicated that they were keen to fully engage with the OFL from the start. Staff were encouraged to consult with the OFL when considering public-private partnership ideas and potential projects. At the same time, the Advisory Committee counseled the OFL to be even more proactive than it had been previously and to work toward establishing meaningful collaboration opportunities earlier. The positive embrace from Governor Whitmer's team and the OFL's readiness to jump in quickly to facilitate connections has given rise to faster partnership linkages.

For example, within the first three months of Governor Whitmer's administration, the OFL noted that the opioid crisis was an emerging issue on the executive team's radar. The OFL supplied the team with information on how the philanthropic community was currently tackling the problem, including an active funder list, and shared its own institutional knowledge around the issue. The OFL also set a meeting with executive team leaders to discuss Bloomberg Philanthropy's upcoming \$10 million investment announcement to fight the opioid crisis in Michigan. As a result of these early efforts and the new administration's openness, the OFL had the chance to engage both executive team members and Michigan's leading health funders ahead of the major announcement, laying the foundation for future partnerships.

### **Building and Maintaining Stakeholder Relationships**

Understanding an administration's stylistic nuances has aided the OFL in evolving its communication and outreach tactics and has enhanced the Office's capacity to be flexible and strategic in changing administrative environments. Yet another contributing factor to the OFL's long-term effectiveness has been the staff's willingness to readily serve both government partners and the philanthropic community.



Understanding an administration's stylistic nuances has aided the OFL in evolving its communication and outreach tactics and has enhanced the Office's capacity to be flexible and strategic in changing administrative environments.

Regular evaluations of the Office revealed that its staff is uniformly respected for their knowledge and facilitation skills, serving as effective matchmakers between public and private sectors. In interviews, stakeholders from across governor administrations and state departments noted how easy the OFL is to work with, often citing the staff's responsiveness, accessibility, and strategic thinking as important elements in their collaborations and interactions. Stakeholders also identified that the OFL uses both formal and informal communication channels to share information and develop relationships.

### **Communication Tactics Supporting the OFL's Relationship-Building Efforts**

#### FORMAL METHODS:

- **Advisory Committee meetings** the OFL, supporting funders, and at least one administration member attend, sharing updates on their work
- **Regularly scheduled meetings between the OFL and administration members** to touch base on priorities and projects, and to share insights and knowledge

#### INFORMAL METHODS:

- **Engaging in casual conversations** to cultivate personal relationships with executive staff members
- **Embracing an open-door policy** to allow for easy access to new ideas and follow-up discussions

At a high level, the Advisory Committee serves as a formalized communication avenue where administrations can share updates on their work and the OFL can identify areas for greater priority alignment. At a staff level, regularly scheduled meetings between the OFL and administration members allow the Office to determine where there are opportunities and gaps and how to bring government and philanthropic resources together to meet these needs. Through formal meeting channels, stakeholders can access the OFL's expertise and strategic insights, building trust in the Office's ability to bridge sectors and departments.

The OFL benefits from informal methods, including an open-door policy and engaging in casual conversations. Several executive team members noted in interviews that they appreciated being able to walk into the OFL's office and sit down for a quick chat. A stakeholder who served during the Granholm Administration shared that the OFL was "the place to go to think through issues and be strategic." Throughout administrations, these one-on-one talks have sparked new ideas and led to follow-up discussions around shared priorities where opportunities had previously not been established.

According to stakeholders, the OFL has served not only as a source of connections, but also as a resource center, readily supplying documents, reports, and background information on issues of interest. For example, during the Granholm administration, the OFL regularly offered research help on partnership projects; during the Snyder administration, the OFL


aided strategy staff in developing policy briefs; and during the early months of the Whitmer administration, the OFL provided data to help inform the governor's budget-making process. Whenever possible, the OFL has found ways to be an asset and resource to stakeholders. As a state agency director expressed in an interview, the OFL embodies a "hey, what do you need?" attitude. This open, supportive approach has allowed the OFL to be immediately useful to partners and has instilled trust and confidence in the Office's work.

## Managing the Push-and-Pull Between Government and Philanthropy


As the OFL builds and maintains stakeholder relationships, the Office also needs to manage government and philanthropic expectations and educate the sectors about each other's work to facilitate partnership opportunities. To bring public and private partners together, the OFL seeks to understand their priorities, knowing that not every idea or project will find alignment and support.

The OFL regularly communicates with foundations to better understand their work plans and sets meetings with executive staff and state department directors to learn about projects they are hoping to move forward. The OFL also shares updates with foundations to keep them abreast of an ever-evolving policy landscape and informs government partners about philanthropic partners' grantmaking timelines and focus areas.

In an interview, a former executive team stakeholder noted that the OFL readily offered input, information, and foundation connections while they worked on administration projects yet also tuned them into opportunities arising in the philanthropic sector, inviting them to join in on outside meetings and conversations of interest. These types of interactions have helped the Office understand how both sectors are thinking about issues, where partners are at in addressing problems, and at what points collaboration could be suitable.



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The OFL's transparency has won favor among several stakeholders who noted that the OFL's ability to act as a prioritization entity helps cross-sector partners conserve time, energy, and financial resources by re-aligning them around shared issues and goals.

In addition to serving as a connection node between sectors, the OFL actively manages shifting expectations and a constant flow of information from government and philanthropic partners. When an idea reaches the OFL from either side, the Office sets out on fact-finding missions, determining through research and discussions if the idea will be a good partnership fit. The OFL offers honest feedback on where alignment gaps exist and why an idea might not yet be ready for collaborative conversations. This transparency has won favor among several stakeholders who noted that the OFL's ability to act as a prioritization entity helps cross-sector partners conserve time, energy, and financial resources by re-aligning them around shared issues and goals.

## During a Transition: Creating Connection Opportunities

Throughout an administration's tenure, the OFL is an active participant in launching conversations, building relationships across partisan lines, and ensuring cross-sector partners get what they need — whether that includes research reports on priority issue areas, targeted partnership connections, or informed, honest opinions about a burgeoning idea. As one administration comes to an end and a new administration is ushered in, the OFL strives to maintain its position as a trusted resource, knowledge, and sector-bridging center. During this transitional period, the OFL focuses on being supportive of the exiting administration while also building early connections with the incoming administration.

## Providing Ongoing Support to an Exiting Administration

The OFL is ever mindful of continuing to serve the administration currently in office. This is important for the following reasons:


- The OFL plays a role in carrying forward priority work into the next administration;
- The OFL contributes to the historical record of each administration; and
- The current administration could make a recommendation to the incoming administration that may affect the OFL's work.

When an administration prepares to exit, it looks at leaving a legacy, providing orientation materials for the incoming administration, and creating archival documents. To assist with an administration's close-out activities, the OFL keeps the momentum going on priority initiatives that are intended to outlast any one administration. The Michigan Benefits Access Initiative (MBAI) is one such example of a project that began during Governor Granholm's administration and continued as a top priority into Governor Snyder's administration because of transitional intervention efforts by the OFL and its partners.

During the Granholm Administration, MBAI brought together state agencies, the Michigan Association of United Ways (MAUW), and MAUW nonprofit partners with the aim of creating the best possible benefits access system for Michigan. The OFL played a key role in MBAI, providing an open and welcoming table during meetings and ensuring every MBAI participant was accountable to their work goals. At the end of the Granholm Administration, however, the new benefits access portal was not yet finished. Following an OFL-arranged

status meeting with key partners, the incoming Snyder Administration saw the importance of refining benefits access and took immediate ownership of the project. Through MBAI, the OFL demonstrated its ability to sustain multi-level partnerships across administrations amid a major service structure shift within state government. (See Appendix for more information about MBAI.)

In addition to lifting up priority initiatives, like MBAI, to cross administration lines, the OFL has participated in document organization and archiving efforts. According to stakeholders from both Governor Granholm's and Governor Snyder's administrations, the OFL was highly responsive to documentation requests during their transition processes,



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providing copies of FLAC meeting materials, evaluations, and project-related resources. The OFL's participation in document collection activities showed the staff's willingness to remain helpful during a transition while also solidifying the Office's role as part of an administration's legacy.

### **Getting Involved Early with an Incoming Administration**

Along with supporting outgoing administration activities, the OFL must be involved with the next administration to not only continue its own existence (a new administration must agree to keep the OFL on board) but also to begin establishing connections that can develop into fruitful conversations and relationships down the line. Prior to a gubernatorial election, OFL staff members and a selection of the OFL's top supporters, including CMF's president, the Advisory Committee chair, and a funding representative, meet with candidates to share how the OFL has served the outgoing administration.

These briefings are coordinated efforts between the OFL and CMF, with CMF staff making the core arrangements with candidates and the attending parties. During the Granholm-Snyder transition, meetings were set with both candidates directly as neither had prior knowledge of the OFL. Between the Snyder-Whitmer transition, however, the OFL team chose to meet with prospective executive team members as the candidates were already acquainted with the OFL's work.

While the selected attendees have changed during transitions, the briefing agendas have remained relatively consistent. In every conversation, the Office's history of cross-sector partnerships is discussed and support points are highlighted, including data from the OFL's routine evaluations conducted by the Dorothy A. Johnson Center for Philanthropy. This data has covered feedback from funders and state officials along with partnership successes that the OFL has helped facilitate (see Appendix for an example case study that was used during briefings with candidate teams in 2018).

During these early candidate interactions, the Office is presented as a value-added resource to the administration—an entity that can be used to make headway in key priority areas and can help stakeholders be more proactive and engaged. Initial candidate meetings also include a clear discussion on who the OFL is and how the OFL works, given the Office's unique role and positioning between public and private sectors. In the 2018 election cycle, issue-based case studies created by the Dorothy A. Johnson Center for Philanthropy supported the OFL in conveying its role with past administrations and the philanthropic community. In addition to clarifying the OFL's complex, cross-sector work, candidate meetings highlight what has worked well with the outgoing administration and how the OFL can adapt to work effectively with the incoming administration.

#### **Candidate Briefing Topline Discussion Points**

- Who the OFL is and how the OFL works
- History of the OFL's cross-sector partnerships
- Supporting data from regular evaluations
- Track record of partnership successes brokered through the OFL
- What has worked well with the outgoing administration
- How the OFL can adapt to work effectively with the incoming administration
- Confirmation of the Office's continuation with the new administration

The main goal of these briefings is to confirm whether the gubernatorial candidates want the Office to continue or if they are going in a different direction. If the candidates confirm their commitment to the OFL, then CMF and the FLAC remain in touch with campaign teams to answer questions and provide additional information. According to stakeholders, these pre-election touches are important to gain continued support for the OFL and in demonstrating that the OFL is prepared to work with any administration — Democratic, Republican, or otherwise.

Once the general election occurs, CMF, the Advisory Committee, and the OFL kick transition efforts into high gear, knowing that the 60 days between the election and inauguration is a sprint. Early in this dash, the Advisory Committee is enlisted to contact members of the governor-elect's transition team to spread awareness about and emphasize the importance of the OFL, and answer questions that may have arisen since the initial candidate briefing. As the Advisory Committee engages in networking activities, the OFL and CMF sit down with transition team leaders to discuss how the OFL can be helpful.

During Governor-elect Whitmer's administration transition, for example, the OFL was readily consulted for its connections and expertise. In coordination with the Whitmer Transition Team, the OFL invited over 70 foundations to a special informational meeting where funders had the chance to meet policy leads, gain exposure to the transition process, and learn more about the incoming administration. By being supportive during a governor's final term and strategically making early connections with members of the incoming governor's team, the OFL aims to demonstrate that it can serve as a trusted ally across administrations.


## Post-Transition: Establishing Priorities and Relationships

When a new administration steps into the executive office, the first few months are critical to launching relationships and determining where there is public-private priority alignment. During this time, the OFL sets expectations and identifies priorities early while also cultivating relationships with new staff members, helping to establish the Office as a strategic team player that the administration can rely on to deliver high-level partnership work.

### Setting Expectations and Identifying Shared Priorities

Early conversations with a new administration are important for uncovering expectations and priorities. While the new governor has agreed to retain the OFL, legal matters still need to be settled. CMF works with the governor's chief of staff or lead strategy officer to determine what will go into new memoranda of understanding between the administration, the OFL, CMF, and the Charles Stewart Mott Foundation.

During these conversations, topics of discussion include how the OFL staff will interface with policy staff, where the OFL will be located, and what expectations the new administration has of the OFL's role in their work. Across



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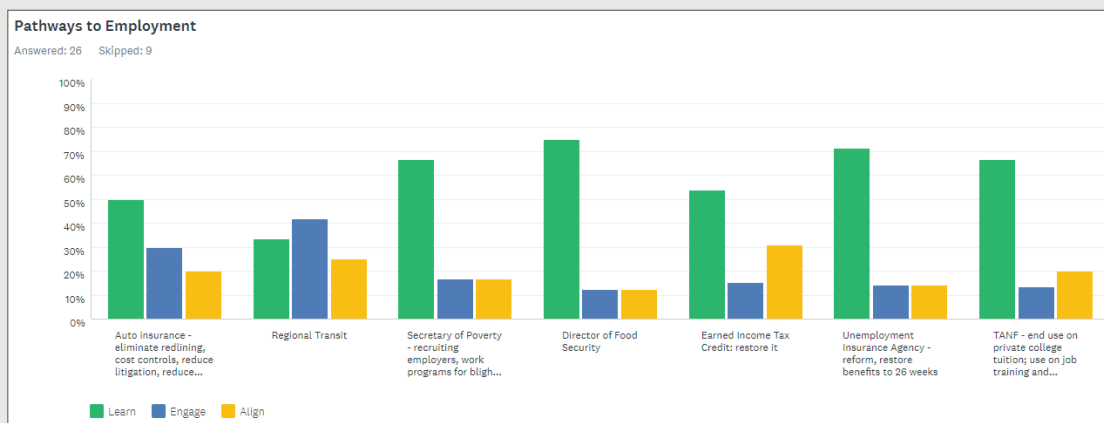


three administrations — from Granholm to Snyder to Whitmer — there have been minor adjustments to these memoranda to accommodate stylistic preferences, such as giving the OFL a cabinet-level position or focusing more attention on one core work objective over another. Crafting the memoranda take time and patience as the OFL’s legal structure is complicated and requires reevaluation with every new administration.

Along with setting formal expectations through memoranda of understanding, the OFL works to define early priorities and potential collaboration opportunities across sector lines. The OFL schedules meetings with top executive team staff within the first two months of a new administration’s tenure and uses these channels to reiterate the Office’s main purpose and to understand how the administration is defining its priorities beyond campaign promises. As the OFL gathers prioritization information, it reports back to philanthropic partners to determine if early collaboration opportunities with the foundation community are likely or could become possible in the future.

Through experience, the OFL has learned that an administration’s priority agenda may not always fall neatly within the philanthropic community’s focus areas. To generate early priority alignment, the OFL developed a new tool — a priority alignment survey — at the start of Governor Whitmer’s administration. The survey was sent to a selection of foundation partners and asked how they would be willing to engage with the administration based on the policy areas highlighted during the gubernatorial campaign and early executive team conversations.

**Figure 2: 2019 Priority Alignment Survey Data Set Example**




Survey participants were asked to indicate their interest in learning about emerging opportunities, engaging with the administration around a priority issue, or aligning its existing work with the administration’s priorities. While this new tool is still being tested, the OFL and its partners are enthusiastic about its potential to help streamline government-philanthropy priority alignment and to uncover opportunities that may otherwise slip through the cracks as a new administration manages its first few months on the job.

## Developing New Relationships and Making Early Cross-Sector Connections

In addition to new priorities, an incoming administration brings fresh, eager staff to the executive office and new state department hires. This change in staff presents the OFL with both the challenge and opportunity of cultivating new relationships. During an administration's first couple months, the OFL adapts its relationship-building tactics to meet the needs of this transitional period.

While the OFL actively schedules formal meetings with new executive staff leadership and departmental heads, the Office also returns to its relationship-building roots — retaining an open-door policy and engaging in casual hallway conversations. As noted in stakeholder interviews, these informal touchpoints offer new staff members the opportunity to learn about the OFL in a friendly and accessible environment.



Instead of immediately latching onto new ideas and jumping into partnership facilitations at the start of an incoming administration, the OFL takes a step back to uncover how it can be most helpful to stakeholders and what information will be most relevant to share.

Over time, the OFL has instituted tactics that facilitate more immediate connectivity early on, including a meet-and-greet in-office event. The OFL held its first such event at the start of Governor Whitmer's administration. The meet-and-greet, attended by executive office members and foundation representatives, brought awareness to the OFL's work and mission, and provided a setting through which early cross-sector connections could be made. Within a welcoming, approachable setting, attendees were able to get better acquainted with one another, share common interests, and ask and answer questions about each other's work.

Being able to establish early engagement and connection opportunities with a new administration stems not only from the OFL's relationship-building skills, but also from the OFL's ability to listen. Instead of immediately latching

onto new ideas and jumping into partnership facilitations at the start of an incoming administration, the OFL takes a step back to uncover how it can be most helpful to stakeholders and what information will be most relevant to share. This approach has allowed the OFL to absorb preferences, identify relationship nuances, and be efficient in serving cross-sector opportunity development from the very beginning.

## The Sustaining Value of the OFL

Over the past 16 years, the OFL has shown that it can effectively transition between gubernatorial administrations from different party affiliations while simultaneously sustaining momentum on important bipartisan issues from one administration to the next. Based on the gathered data, no set formula has guaranteed the OFL's sustainability over the past 16 years. Rather, what emerged through analysis is that the OFL's effectiveness and longevity comes from a collection of sources, including:

- The Office's collaborative founding story;
- The OFL's formalized structure and skilled staff;
- The relationships that OFL staff have cultivated and maintained across sectors and administrations; and
- The Office's role as a resource, connector, and translator for both the public and private sectors.

The OFL delivers sustaining value to its stakeholders because it has developed tactics that allow it to not only survive but thrive during administration transition periods. These tactics include the OFL's ability to:

- Build relationships and sustain partnerships long before administration transition periods occur;
- Be a trusted resource and knowledge center during transitions;
- Serve as a strategic team player once a new administration is established; and
- Remain neutral across administrations, serving as a nonpartisan entity focused on Michigan's children and families.

Taken together, the OFL's transition tactics provide opportunities to work in an efficient and effective manner with administrations as they enter and exit the executive branch. This has enhanced not only the potential and success of public-private partnerships to benefit Michigan but also the Office's own resilience and sustainability during times of change.

## APPENDIX:

### THE OFFICE OF FOUNDATION LIAISON: MICHIGAN BENEFITS ACCESS INITIATIVE CASE STUDY

<http://michiganfoundations.org/sites/default/files/OFL%20Case%20Study%20-%201SD.pdf> (September 2018)



# The Governor's Office of FOUNDATION LIAISON

A partnership between the  
State of Michigan and the  
Council of Michigan Foundations

## Bridging Government and Philanthropy to Improve Benefits Access for Michigan's Families

Michigan's nonpartisan Office of Foundation Liaison (OFL) was created in 2003 at the suggestion of Michigan philanthropic leaders. The Office — the first of its kind in the nation — works to foster partnerships between state government agencies and philanthropic organizations that are likely to result in policy and programmatic reforms to improve the lives of children and families in Michigan. Since its inception, OFL has brokered more than \$150 million in foundation investments for initiatives to increase Michigan's economic competitiveness through reforms in P-20 education, economic and workforce development, health, and land use.

OFL works within three priority issue areas: prenatal to postsecondary education, workforce development, and health. An important, systems-change program that spanned across these areas was the Michigan Benefits Access Initiative (MBAI). Through MBAI, OFL helped bridge the divide between government and philanthropy, ensuring both sectors worked together to improve benefits access for Michigan's families.

### Michigan's Great Recession and the Great Needs of Michigan Families

Michigan was hit especially hard during the 2007 to 2009 recession. Across the state, many residents lost their jobs and had difficulty providing for their families. To find relief, many of these residents turned to the state for resources to keep them afloat through the recession's toughest periods.

However, the state was not prepared to support such an influx of struggling Michigan families using its current benefits access processes. What's more, Michigan families themselves found it difficult to navigate these processes as each type of benefit, from unemployment to health assistance, had different eligibility requirements and their own lengthy applications. Michigan's benefits access system at that time was in desperate need of an

overhaul to adequately support state agencies and the state's struggling families.

In response to the benefits access challenge facing Michigan, then-Governor Granholm took on the ambitious task of finding a solution to streamline the benefits access process. Under the Granholm Administration, a system called Helping Hands was developed that served as an online platform where Michigan residents could discover what types of benefits they could apply for and which specific department they needed to contact to do so.

### Two Separate, Competing Systems Become One Stronger Solution

Helping Hands was a step in the right direction and a quick fix during an especially difficult time, but the state knew it needed to do better by Michigan's families and streamline the benefits eligibility, application, and case management process. Following Helping Hands, the state heavily invested in a new online system called Bridges that brought together previously siloed state departments to create a common benefits eligibility determination system.

In 2009, the then-Department of Human Services (DHS) began to develop an improved system called MI Bridges that would build off the advancements in the previous system and allow Michigan residents to better manage their case and apply for benefits online using a single application form. As DHS worked on MI Bridges, the nonprofit sector was simultaneously looking for a solution to Michigan's still cumbersome benefits access process. With a market study completed and a technology vendor selected, the Michigan Association of United Ways (MAUW) and its nonprofit partners were set to embark on a parallel course of creating an improved benefits access and outreach system for Michigan.

[michiganfoundations.org/ofl](http://michiganfoundations.org/ofl)

The two competing efforts living in the government and nonprofit sectors soon came to OFL's attention. OFL understood that at the heart of the benefits access issue was helping Michigan's most vulnerable residents and saw that the two separate systems would do them more harm than good.

OFL, functioning as a bridge between the philanthropic and government worlds, encouraged MAUW, MAUW nonprofit partners, and state agencies, including the DHS, the Department of Community Health, and the Department of Management and Information Technology, to come together and discuss what they were working on and how they could collaborate.

After many meetings and education sessions, including an OFL-arranged trip to Ohio to see their newly adopted third-party benefits access system, the Michigan Benefits Access Initiative (MBAI) was formed. MBAI brought together state agencies, MAUW, and MAUW nonprofit partners with the aim of creating the best possible benefits access system for Michigan that would be owned by the state and supported by MAUW and its nonprofit partners through the development and training of community partners.

OFL played an integral role in MBAI by providing an open and welcoming table during meetings and ensuring each MBAI participant was accountable to their work goals and stayed true to the core mission of helping Michigan families through a better benefits access portal. In addition, OFL served as an educator and provided foundations with key information about MBAI's work that ended up motivating the Open Society Foundations, the Kellogg Foundation, the Kresge Foundation, Consumers Energy Foundation, DTE Energy Foundation, the C.S. Mott Foundation, the McGregor Fund, the Ford Foundation, and the Max and Marjorie Fisher Foundation to provide significant support for the new system's development.

Thanks to OFL's strategic early intervention, the creation of two separate, competing systems was halted in favor of a stronger system that leveraged the unique resources of both the state and the philanthropic community.

### **Building on Past Work for Continued Future Improvement**

At the end of the Granholm Administration, the new benefits access portal was not yet finished. Thankfully, the incoming Snyder Administration saw the importance of refining benefits access and took immediate ownership of the project following an OFL-arranged status meeting with key partners.

### **OFL's Key Roles in Improving Benefits Access for Michigan's Families**

- ➊ Connecting public and private partners to education opportunities
- ➋ Bridging public and private sectors to tackle a complicated state system
- ➌ Keeping government and philanthropic partners connected, accountable, and on mission
- ➍ Educating and inspiring funding partners about opportunities to leverage resources with the state

The new Administration built upon MBAI's past work and rolled out the Integrated Service Delivery (ISD) model that has brought the 211 database into the MI Bridges platform, streamlined and condensed the benefits application (down to 20 pages from the original 65), and created a call center to provide specific, nuanced support to Michigan's residents.

As the ISD model was created, OFL kept the philanthropic sector informed, showing foundations how their partnership with the state had paid off and how their investments were backing an incredible systems-change effort that would improve the lives of countless Michigan families.

Each step along the benefits access improvement process was necessary for the next one to occur. OFL's strategic convening, facilitation, and relationship-building work combined with MBAI's unique public-private partnership paved the way for Michigan's current benefits access model that has impressed other states who are now looking to replicate it.

