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### THE IMPACT OF CONSERVATIVE PHILANTHROPY IN THE PUBLIC SCHOOL REFORM MOVEMENT

**Julia Andrews**  
**Center for Public & Nonprofit Leadership**

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*Educating Leaders Who Change the World*

THE CENTER FOR PUBLIC & NONPROFIT LEADERSHIP  
3240 Prospect Street, NW Lower Level  
Washington, D.C. 20007-3214  
Phone: 202-687-0500 Fax: 202-687-0580  
E-mail: [cpnl@georgetown.edu](mailto:cpnl@georgetown.edu) <http://cpnl.georgetown.edu>



## Introduction

Even those staunchly opposed to publicly funded vouchers might still admire the effectiveness that conservative philanthropies have had in advancing their vision of public school reform. Or perhaps they are instead embittered by the ability of a small group of individuals and foundations to exercise such profound influence over the direction of primary and secondary education in the United States. After all, the last 15 to 20 years has been witness to a proliferation of charter schools and voucher programs promoting school enrollment outside of the traditional public school system. Much of this growth can be attributed to the work of conservative advocates. Longstanding think tanks and foundations have taken education reform under their wings, and newly founded think tanks and advocacy groups have sprouted for the express purpose of advocating for choice in public school reform.

Accompanying the rhetoric and research of advocates have been millions of charitable, private, and public dollars directed towards advancing this market-based approach to primary and secondary education. But the work of foundations and other donors far exceeds financial giving alone. In fact, philanthropies have given seed money to develop advocacy groups and research centers, have served on the boards of such groups, and have provided technical support.

This paper aims to synthesize the existing literature on the strategies of conservative philanthropy to better assess what is known about the public education reform movement, as well as to extend the current knowledge base by identifying additional links between philanthropy, advocacy, and policy.

## Methodology

Based on findings from the existing literature, conversations with those knowledgeable on the topic, and Internet research, I devised a list of some of the major “players” in education reform—meaning foundations, think tanks, and advocacy groups that have had a hand in advancing the conservative education policy agenda.<sup>1</sup> (See Table 1 for foundation list.) The analysis is based off of the final list, which includes 14 foundations, and the roughly 110 research institutions, advocacy groups, and schools to which they granted funding. Using the latest 990 IRS forms (in most cases, 2002) of the relevant foundations, I identified the funding amounts and destinations of their education reform grants whenever possible.<sup>2</sup> From there, I traced the related work of the nonprofits they funded. In addition, the movement has received government legislative support at the federal and state levels. Since such policies enhance the efforts of philanthropic institutions and individuals, this report documents which states have adopted voucher and charter school laws. Although not comprehensive, the results of the research suggest that the movement has grown dramatically in both breadth and depth, namely due to conservative philanthropic influence.

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<sup>1</sup> This is an augmented list from the one produced by People for the American Way in its publication “Follow the Money.”

<sup>2</sup> In some cases it is not possible to determine whether a grant went to supporting education reform, because it was granted as general operating support to organizations that engage in many issues, including public education reform initiatives.

## Influential Literature

A survey of the literature reveals that there has not been a comprehensive look at the effect of conservative philanthropy on education—perhaps because the relevance of the topic has only recently become apparent, or because its massive effects are hard to trace. There is, however, upcoming research from Frederick Hess of the American Enterprise Institute that promises to be more comprehensive.<sup>3</sup>

The idea for this paper was born out of the efforts of the National Committee for Responsive Philanthropy (NCRP) to trace the strategies of conservative foundations in advancing their public policy agendas. Since its seminal publication in 1997 on conservative philanthropy and its effect on policy, NCRP has been at the forefront of identifying the links between grant makers on the right and their strategic funding and influence over policy projects. The report concludes that several factors have contributed to the effectiveness of these right-wing foundations: 1) Foundation leadership has a clear vision and an acute political intention that guides its grant making. 2) Foundation funding focuses on capacity building of the nonprofits they serve: Funds are concentrated among a relatively small number of organizations, a substantial amount of its grant dollars are allotted for general operating support (as opposed to specific programs), and long-term grantee support (up to two decades) is common. The result is that grant recipients have stability and flexibility. They are able to concentrate on conducting timely research and advocacy, rather than continuously searching for funds to survive. A related issue, though not mentioned, is that some research institutions that are not financially secure are prone to respond to requests for proposals on issues that may not fit their primary interests. They are motivated to apply because of the pressure to obtain funding. Institutions in this precarious state struggle to keep their doors open at all costs, including putting their missions on hold. 3) These foundations also understand the role different institutions play in shaping and impacting the policy framework. Thus, they engage the process at varying policy levels (national, state, and local) and with a network of different institutions and mediums (nonprofit advocates, think tanks, universities, government and media). 4) Additionally, right-wing foundations work hard to support institutions, policy leaders, and public intellectuals who support conservative policy philosophies (including free market and limited government perspectives). This ensures that the conservative ideological base will continue to evolve with substantial support well into the future.

NCRP's most recent report, *Axis of Ideology: Conservative Foundations and Public Policy* (2004), profiles 79 grant-making institutions and the policy-oriented nonprofits they fund. The Report identifies the strategies used to successfully translate ideas into policy, focusing broadly on education, business, and defense. In addition to corroborating the findings of their previous work, another contribution of this report is its exposure of the networks and political connections between the boards and staffs of conservative foundations and the boards and staffs of their nonprofit grantees. The report reveals that 19 individuals serve on the board or staff of at least one foundation and of at least one nonprofit. In addition, those at the helm of foundations also serve on boards of nonprofits to which they provide grants. Thus, in some cases, there is no separation between the funding and the vision of its use. For example, in 1999 the Charles G.

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<sup>3</sup> <http://www.aei.org>

Koch Foundation awarded \$200,000 to the Institute for Humane Studies, which is chaired by Charles G. Koch himself.<sup>4</sup>

Axis of Ideology also focuses more specifically on the education industry, stating that, of the foundations reviewed, education initiatives received 10 percent (\$26.3 million) of the total conservative funding between 1999 and 2001. Funds for education reform initiatives accounted for more than a quarter of the spending on all education grants (\$7.2 million). The study lists the Lynde and Harry Bradley Foundation, the Milton and Rose Friedman Foundation, and the Walton Family Foundation as major funders of public education reform, and counts the Partners Advancing Values in Education (PAVE) and the Center for Education Reform among the major nonprofit advocates.

The People for the American Way (PFAW) and its affiliated Foundation provide perhaps the strongest voice on the subject by serving as a watchdog of conservative philanthropy, documenting its activities and questioning its motivations. One of its many provocative pieces, *Follow the Money: Funding and Support for Voucher Programs*, documents four individuals, four foundations, and 12 advocacy groups that are among the most influential in the public education reform movement. The aim of this brief document is to illuminate the paucity of individuals and groups spearheading the major initiative of privatizing education. The article lists the philanthropic individuals, foundations and nonprofit advocacy groups with their respective agendas, missions, and related finances in order to trace the flow of funding.

Another important paper, *Foundation Engagement in Education Policymaking: Assessing Philanthropic Support of School Choice Initiatives* (2003) by Mintrom and Vergari, documents foundation involvement in California and New York. In particular, it focuses on the proliferation of charter schools and the efforts that have been made to develop public voucher programs. The authors highlight several main findings. Foundations and individual philanthropists in both states have devoted large sums of money at both the local and national level to support voucher and charter initiatives, in addition to establishing private voucher programs. Significant portions of their support are directed towards research and information dissemination in order to shape policy conversations regarding school choice initiatives. In line with NCRP's findings, foundations work to develop networks of advocates, practitioners, and other allies in order to exchange ideas and discuss challenges. Foundations have also cultivated relationships with elected officials, who then promote foundation efforts. And finally, the most influential foundation leaders in the movement have extensive backgrounds in business and investment. This enhances their ability to make strategic plans about how to invest their funds for maximum leverage.

### **Conservative Foundation Analysis**

The 14 foundations under study were included in this analysis because they make substantial investments in organizations that focus on advancing parental choice. Most of their missions state their devotion to advancing the support of free enterprise and limited government. (See Table 1). Thus, it is only natural that they support research and programs devoted to breaking

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<sup>4</sup> NCRP 2004. p. 41.

the government monopoly on public education and making parental choice universal. Other foundations, such as the Walton Foundation, profess to adhere to no particular ideology, but rather are dedicated to focusing their charitable giving to that which they can impact most. On the other extreme is the Milton and Rose Friedman Foundation; its sole purpose is to promote educational choice.

Much of the conservative philanthropic funding of the education reform field mirrors that of other issue areas. The vast majority of the funds granted by these foundations were made in the form of general operating support (also specified as “unrestricted” or “undesignated” on the 990 forms of some foundations). As suggested by earlier research, this allows many organizations the flexibility to respond promptly and freely to developing issues. In addition, funds were granted to a variety of education reform institutions and at different levels to ensure widespread impact. For example, grants were given to national and state think tanks to fund research; to charter schools and voucher funds to increase the number of children able to participate in alternative schooling; to charter school networks and advocacy coalitions to spread the flow of knowledge; and to advocacy organizations that participated in outreach programs to increase the support for and understanding of parental choice options.

The finding by the National Committee for Responsive Philanthropy regarding the concentration of funding also seems to hold for education reform efforts. For example, the Heritage Foundation received grants from eight of the 14 foundations, while the Cato Institute, the Manhattan Institute, and the Pacific Research Institute for Public Policy each received grants from six. In addition, grants are sometimes concentrated within regions in order to strengthen impact. For example, three of the eight grants allocated by the Thomas B. Fordham Foundation for education reform were for organizations in Ohio: the Dayton Chamber of Commerce for its education resource center; the Ohio Community School Center, to protect and expand the charter school movement within the state; and the Ohio Foundation of School Choice, for the creation of a website. By supporting these three complementary institutions within the same region, the Fordham Foundation made a greater impact than it would have, had it instead spread its funding to three separate states. The concentration of funds will allow the charter movement in Ohio to grow faster and to garner greater support, and, if successful, to serve as a model in other states.

#### Nonprofit Grantees Analysis

The foundations studied in this report provided more than 26 million dollars (in a one-year period)<sup>5</sup> to organizations and schools that work to advance public education reform. Of the 175 grants traced, 93 (or 53 percent) were clearly for the advancement of charter schools or voucher programs. These grants, which total roughly \$19 million (or more than 70 percent of grant dollars considered), were given directly to charter schools, alternative schools that accept vouchers, charter school associations or other support groups, or research institutions whose sole purpose is to advance education reform. As anticipated, their activities ranged from funding voucher programs and backing advocacy institutions to supporting fellows who engaged in conservative reform research. The other 82 grants (totaling about \$7 million) considered in this analysis were included because they were granted as general support dollars to organizations

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<sup>5</sup> Data were obtained from the latest available 990 form of each foundation, which ranged from 2001 to 2003. See Table 1. The total funding of \$26 million is likely to be an underestimate because grants that went to schools that were not obviously charter schools or schools that accepted vouchers were not included in the total.

with programs or significant work in many areas, including education reform. Although money to these organizations could have been spent in a myriad of ways—from funding other projects to paying the organization’s utility bill—it is reasonable to expect that some money, at least indirectly, went to support education initiatives. Examples of national multi-issue organizations that received large amounts of unspecified funds are the Cato Institute, the Heartland Institute, and the Heritage Foundation. The three organizations account for 20 of the grants for a total of \$2.9 million in general operating support. While these organizations focus on multiple policy issues, each has published extensively on the value of parental choice in education.

One quarter of the grants went directly to charter schools and private schools that accepted vouchers. These grants tended to be much larger than those for advocacy or research efforts. The overwhelming majority of such grants were from the Walton Family Foundation. In addition, several grants were earmarked for scholarship programs. The Children’s Scholarship Fund (CSF), which began in 1998 with a \$100 million grant from John Walton and Ted Forstmann, received grants from the Walton Family Foundation (\$5,000) and the Fordham Foundation (\$375,000). CSF has provided partial tuition assistance to help more than 62,000 low-income children pay for private schools. The Castle Rock Foundation provided \$10,000 to the Clare Boothe Luce Policy Institute’s CHOICES Scholarship Program, and of the \$360,000 grant dollars given to Parents Advancing Choice in Education by the Fordham Foundation, \$275,000 was slated for its scholarship program.

More than one third of the grants tracked went to multi-issue state and national research institutions. Many of these organizations share the same ideological philosophies as the foundations that fund them. With the exception of the Center for the American Experiment, Minnesota’s conservative think tank, most public policy research and education institutions profess to be nonpartisan. Even so, the majority of the funded policy institutions at both the state and national levels support free enterprise and limited government. Counted among this group are Ohio’s Buckeye Institute, Washington’s Evergreen Freedom Institute, and the nationally focused Pacific Research Institute. The remaining policy institutions, such as the Mackinac Center for Public Policy, do not claim to adhere to a particular ideology, but rather are generally devoted to improving the quality of life for citizens within their region of interest.

The remainder of the funds went to organizations solely assembled to work on education reform, or organizations that play peripherally important roles, such as legal organizations. Included under the former group are those organizations that fill research, outreach, support, and advocacy roles. Examples of two such groups are the Center for Education Reform and the Black Alliance for Educational Options. The Center for Education Reform (CER) was awarded nearly \$300,000 in this period from the Jacqueline Hume Foundation, the Walton Family Foundation, and the Bradley Foundation. The 10-year old organization advocates for more choices in education, and works to inform and encourage parents, policy makers, and education reform groups on school choice to ensure that all children receive quality education. CER serves as a clearinghouse of information on reform. Its founder and director Jeanne Allen helps the organization maintain its prominence because of her frequent commentaries in both mainstream and opinion-based media. According to CER’s website, “her commentaries and thoughts appear in more than 200 publications yearly, including The Washington Post, the Chicago Tribune, The Wall Street Journal, USA Today, Investor’s Business Daily, The Dallas Morning News, and Newsday.

Leading family magazines such as Good Housekeeping, Parents, and Reader's Digest frequently rely on Allen's expertise on parent and education issues.”<sup>6</sup> This type of exposure ensures that any work produced with foundation dollars has a highly visible impact.

The Black Alliance for Educational Options (BAEO) received nearly three quarters of a million dollars in a one-year period from the Jacqueline Hume Foundation, Walton Family Foundation, and Milton and Rose D. Friedman Foundation. The organization is noteworthy because it serves as a national voice for expanding parental choice to African Americans. BAEO was born in 2000 out of the Symposium of Options in 1999 and 2000, which was funded by Marquette University’s Institute for the Transformation of Learning in Milwaukee. BAEO’s goals are to: educate and inform the public about parental choice initiatives on the local and national level, educate black families about the various types of educational options available to them, and to create and support efforts that empower black parents to exercise choice in determining options for their children’s education.<sup>7</sup>

The other funded organizations are generally networks that exist to empower educators, advocates, and schools in order to strengthen the education reform movement. Examples of these organizations are the NewSchools Venture Fund and the New York Charter Schools Association. The NewSchools Venture Fund is innovative in that it is a venture philanthropy firm that seeks to transform public education through education entrepreneurs. The Fund raises capital from donors that is then invested in the nonprofit and for-profit efforts of education entrepreneurs. One of its resources is the Charter Accelerator Fund, a fund of \$30 million devoted to accelerating sustainable growth of nonprofit charter school systems.<sup>8</sup>

The New York Charter Schools Association (which received more than \$440,000 from the Walton Family Foundation) exists to assist in the organization and operation of New York charter schools. The Association provides technical assistance and training for individual charter schools in administrative and educational areas; advocates to policy makers and the public on behalf of charter schools, briefs schools regularly on relevant legal and regulatory issues; informs members on national charter school news, and hosts conferences, workshops and training sessions.<sup>9</sup>

### **Connections Considered: Foundation-Nonprofit, Foundation-Foundation, and Nonprofit-Nonprofit**

The most obvious connection between philanthropy and nonprofits is among the philanthropists who provide both the capital and momentum to begin a reform initiative. According to a report by the People for the American Way, Ted Forstmann and John Walton are the frontrunners in philanthropist-nonprofit connections. Their relationship to the Children’s Scholarship Fund embodies the direct connection between capital and initiative. The two began CSF with \$100

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<sup>6</sup> <http://www.edreform.com/>

<sup>7</sup> <http://www.baeo.org/about/history.htm>

<sup>8</sup> [http://www.newschoools.org/strategy/charter\\_fund.htm](http://www.newschoools.org/strategy/charter_fund.htm)

<sup>9</sup> <http://www.nycsa.org>

million of personal money. As noted above, the Fund has gone on to serve more than 62,000 children since it began in 1998. Walton and Forstmann co-chair the CSF, which received a grant from the Walton Family Foundation in the year studied. In addition, PFAW suggests that BAEO began its operations with a budget solely provided by the Walton Family Foundation. The research for this paper found that nearly three quarters of a million dollars went to BAEO during the period under study, the majority of which came from the Walton Family Foundation.

In addition, foundations may also share resources. The 990 form of the Walton Family Foundation also reveals that a grant in excess of \$200,000 went to the Milton and Rose D. Friedman Foundation—which only focuses on education reform initiatives. The purpose was simply specified as “charitable.” And a final interesting connection is that Marquette University’s Institute for the Transformation of Learning in Milwaukee, sponsored the symposium from which arose the BAEO. Thus, this small study alone reveals at least three inter-institutional connections that enhance power by creating new institutions and sharing resources. So, for example, while BAEO and the Institute for the Transformation of Learning may appear to provide two distinct voices with complementary philosophies, the former was actually born of the latter. In practice, there could be dozens of organizations that stem from a single originator, strengthening his voice many times over.

#### Funding Leverage and Federal and State Legislation

Currently, 40 states, the District of Columbia, and Puerto Rico have enacted charter school laws. Several foundations, particularly the Walton Family Foundation, have invested in dozens of charter schools located in many of these states—from elementary school to high school. The funds are generally unspecified, and have ranged from a low of \$10,000 to a high of \$190,000. In addition, several state charter school networks and resource centers are funded in order to support the growing number of schools. The millions of dollars funneled into charter schools by these foundations undoubtedly serve to enhance the qualities and capacities of these schools. In addition, foundations may support groups that are trying to get charter school legislation passed in their states. For example, Vermont is one of the ten states that does not have charter school legislation. The Ethan Allen Institute, Vermont’s free-market based public policy think tank, strongly advocates for charter school legislation for the state. The Jacqueline Hume Foundation indirectly enables the Institute’s push for charter schools through its \$12,000 undesignated grant to the organization.

While the majority of states have enacted some type of charter school legislation, only nine states, the District of Columbia, and Puerto Rico have allowed for the use of public money to attend private or parochial schools. The states are Arizona, Colorado, Florida, Illinois, Iowa, Minnesota, Ohio, Pennsylvania, and Wisconsin. Each has adopted either a tax credit, tax deduction, or publicly funded vouchers program. Of the states with voucher legislation or tax break legislation, Florida, Minnesota, Ohio, and Wisconsin have received significant levels of funding from these foundations for their voucher efforts.<sup>10</sup> Based on the data observed for this paper, it is unclear whether the funding preceded the adoption of the laws, or the laws preceded the funding of the initiative. Either way, it seems reasonable to suspect that the funding either helped fuel the movement to pass the legislation, or it has helped to further the aims of the legislation. An example of the latter is illustrated by the Arizona Dream Foundation, a nonprofit information clearinghouse designed to: inform residents about Arizona’s scholarship tax credit,

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<sup>10</sup> <http://www.ecs.org/clearinghouse>

disseminate information on the state's scholarship organizations, and provide guidance to taxpayers on how to claim tax credits for making cash contributions to scholarship or tuition grant programs. Such tax credits allow taxpayers to take dollar-for-dollar tax credit for up to \$500 of donations for individuals, and \$625 for married couples.<sup>11</sup>

In the federal sphere, the government has allotted significant funds to nonprofit organizations in order to conduct information campaigns explaining the provisions of the No Child Left Behind Act. As noted on the website of the Department of Education, two such nonprofits that received these funds were the Black Alliance for Educational Options (BAEO), and the Hispanic Council for Reform and Educational Options (CREO)—the Latino counterpart to BAEO. In fiscal year 2003, each organization received a one-year, \$500,000 grant. A March 26<sup>th</sup>, 2004 transcript from NOW with Bill Moyers, notes that CREO did not even launch nationally until 2003.<sup>12</sup> Thus, it apparently received federally funded money before it had developed a track record. Although the government funds were not slated for voucher program promotion, they were given to organizations that actively advocate for vouchers. The government-provided funds serve to increase the visibility and the credibility of these organizations, ultimately increasing the momentum gained from the initial foundation dollars.

### **Note of Caution: Philanthropy's Role in an Entitlement System**

Although this paper does not take a stance on the values of education reform itself, there is one cautionary issue worthy of being raised. It seems dangerous to build an entitlement system reliant on charitable giving, as is the case in philanthropic advancement of primary and secondary education reform. Foundations are augmenting the capacity of alternative schools in a way that may be unsustainable if they choose not to renew their funding at the same levels. If conservative foundations succeed in their mission to universalize parental choice, government funds will be diverted from schools to families in the form of vouchers. However, using vouchers to fund these decentralized schools will likely be more expensive than funding fewer, larger schools. Thus, if foundations do not permanently support alternative schools, there is a risk that such a system will fail. While this is not a reason to abandon support for parental choice, it is worth noting when counting the virtues of alternative schooling options.

### **Conclusions**

As anticipated, conservative foundations appear to be very strategic in pursuing their education reform initiatives: They back everything from research and advocacy to the schools and scholarship programs. They operate on national and state levels. They create funds, develop institutions, and support fellows and information-sharing networks. Funds are granted liberally and in many cases without specification. In addition, conservative philanthropy enables charter schools to improve their functioning by ensuring that they are adequately funded. It also increases the public's knowledge base about reform, and makes the debate about publicly

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<sup>11</sup> arizonadream.org

<sup>12</sup> [http://www.pbs.org/now/archive\\_transcripts.html](http://www.pbs.org/now/archive_transcripts.html)

funding private education more relevant by increasing both the number of students eligible to participate and by informing more parents and stakeholders about the discussion. Thus, the movement on reform is infinitely more prominent. In fact, it is fair to assume that any semblance of a publicly funded voucher program would likely take much longer to emerge—or would not emerge at all—without the funds of conservative philanthropy to provide the seed money for voucher models and other reform efforts.

<b>Table 1: Foundations that Advance Conservative Efforts and Year of Data Collected</b>		
<b>Foundations</b>	<b>Purpose/mission*</b>	<b>Latest 990 IRS form</b>
<b>Bill and Berniece Grewcock Foundation</b>	--	2002
<b>Carthage Foundation</b>	concerned with national and international public policy issues	2002
<b>Castle Rock Foundation</b>	promote better understanding of free enterprise, limited government	2003
<b>Charles G. Koch Charitable Foundation</b>	research and education into free societies, in particular how they advance the well-being of mankind	2002
<b>Claude R. Lambe Charitable Foundation</b>	--	2002
<b>Coors Foundation</b>	free-enterprise system, traditional American values and the rule of law;government is limited to the protection of constitutional rights and national defense	2003**
<b>David H. Koch Charitable Foundation</b>	--	2001***
<b>Gordon and Mary Cain Foundation</b>	--	2002
<b>Jaquelin Hume Foundation</b>	--	2002
<b>John M. Olin Foundation</b>	strengthen economic/political/cultural institutions based on constitutional government and private enterprise	2002
<b>Lynde and Harry Bradley Foundation</b>	preserving and defending the tradition of free representative government and private enterprise	2002
<b>Milton and Rose Friedman Foundation</b>	promote educational choice	2002
<b>Sarah Scaife Foundation</b>	address major domestic and international issues	2001
<b>Scaife Family Foundation</b>	--	2003
<b>Thomas B. Fordham Foundation</b>	advance understanding and acceptance of effective reform strategies	2002
<b>Walton Family Foundation</b>	focus their philanthropic efforts to assure that their charitable giving would have the most positive impact	2002
<p>Notes: *Purpose and mission excerpted from statements on their websites  **The dates of the 2003 990 form of the Coors Foundation are December 1, 2002 through November 30, 2003.  *** The latest 990 form available for for David H. Koch Charitable Foundation was 2002. However, no grant money was dispensed that year, so the 2001 990 was used instead.</p>		

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