

DO NONPROFIT NETWORKS CONTRIBUTE TO THE
EFFECTIVENESS OF STATE-LEVEL FREE-MARKET
THINK TANKS?

Ann C. Fitzgerald

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Leslie Lenkowsky, Ph.D., Chair

David Reingold, Ph.D.

Master's Thesis
Committee

James Piereson

DEDICATION

This thesis is dedicated to my parents, who instilled in me the value of education by their example and sacrifice.

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CHAPTER 1 INTRODUCTION

As Congress debates and decides issues of national interest such as health care, the federal deficit, education, and the environment, a multitude of interest groups seek to influence the final legislation and shape future policy outcomes.

Public policy institutions—or think tanks—represent one type of organization that is often found in the thick of the debate. Nationally focused groups from the ideological conservative Heritage Foundation to the liberal Center for American Progress are comprised of experts who develop solutions to policy problems and actively market these ideas to lawmakers and the public.

Yet, because of the complex nature of the legislative process, the policy impact of nationwide think tanks is rarely clear-cut. Policy experts may insert themselves into the debate at any point from the time an idea is formulated until a bill is voted upon. In addition, the manner in which think tank experts exert influence is varied. Some work directly with lawmakers, while others use the media or public conferences to introduce their ideas into the debate and the decision-making process. Still others build coalitions with like-minded partners or help engage individuals in the political process through online social media outlets. These variables make the impact of think tanks difficult to quantify.

Most think tanks are nonprofit organizations and registered with the Internal Revenue Service as 501(c)(3) educational institutions. As such, they are prohibited by law from supporting candidates or spending a large portion of their revenue lobbying for or against legislation. Nonetheless, think tanks can be influential in swaying public

support for or against congressional proposals. In the best-case scenario, they are able to change public policy by creating the environment that encourages policy change. As John Miller explains, “Think tanks are perhaps best at creating the conditions for success, as opposed to being directly responsible for the success itself.” (Miller, 2006) They do this by conducting policy research, briefing legislators, and educating citizens through appearances in the media.

Think tanks are not a new invention. Their history dates back to the early twentieth century with the formation of scholarly institutes, like the Brookings Institution, that provided expertise and analysis to government. Think tanks span the political spectrum. In the past 35 years or so, however, the landscape has been dominated by organizations, primarily on the political right, that advance a specific ideology through scholarly research. Their research, conducted by economists, social scientists, and other experts that they employ, is designed to back their political ideologies. The Heritage Foundation in Washington, D.C., for example, has been credited with being among the first to marry marketing with policy and, by doing so, has influenced Congress to enact many conservative legislative policies, such as tax cuts and welfare reform.

As the number of policy groups from all ideological perspectives has proliferated to the hundreds, scholars have been examining whether think tanks are effective and, if they are, what makes them so. Their conclusions have been mixed, but two intertwined indicators of success are commonly cited: media visibility and budget size. Although it may not be possible to link specific media exposure definitively with a policy that has been adopted or rejected, the more media attention a think tank receives, the greater its perceived influence among lawmakers will be and the more likely that its experts will be

asked to testify before congressional committees and otherwise contribute to the policymaking process. (Abelson, 2002) Since media and public opinion are known to influence the behavior of policymakers (Rich and Weaver, 2000), think tanks have become skilled in using print and electronic media outlets to their advantage.

Studies also show that the level of financial resources is the single most important organizational characteristic in attracting media attention. (Rich and Weaver, 2000) Unsurprisingly, perhaps, a larger operating budget gives a think tank the ability to hire more prestigious staff and invest in more marketing and promotional activity, but Rich and Weaver found that variations might exist due to organizational age, personal networks, resource allocation, and other factors.

More recently, researchers have identified social networks as another variable that helps advance a think tank's agenda. A think tank's formal and informal connections to other nonprofits links its experts and grassroots constituencies and contributes to its effectiveness by disseminating ideas more broadly, accessing new funding resources, and developing coalitions in support of certain policy goals. Social networks, in general, have been found to have value in society by fostering trust and reciprocity among individuals and communities. The social capital that results—much like financial capital or human capital—improves the productivity of the individual actors and the organizations involved. (Putnam, 2000)

Nonprofits use horizontal and vertical ties to generate different forms of social capital. They work across their horizontal networks to deliver services, share facilities, or mobilize resources with other, similar groups as a form of bonding social capital. (Passey and Lyons, 2006) This form is often attributed to the connections built within or between

homogenous groups, where the actors in the network share the same background, values, identity or interests. (Putnam, 2000) They also use their horizontal networks to link with groups that do have the same type of members or interests. This is referred to as bridging social capital and is associated with more variation among the actors. It is useful in engaging nonprofits in collective activity, from which each benefits from, and disseminating information. (Putnam, 2000) (Lofors, Sundquist, 2007)

In addition, a nonprofit may activate its vertical networks to build a trusting relationship with an organization that has greater status or power in the social network. The linking social capital that results gives the organization access to information, resources, and/or representation in a wider sphere of influence. Passey and Lyons use examples of how linking capital may connect a group to national governments or to the national media. (Passey and Lyons, 2006)

Nonprofit think tanks may employ these three forms of social capital simultaneously. (See Table 1.1.) For instance, a think tank may bond with firms sharing the same ideological agenda, bridge to lawmakers with opposing views in order to bring about policy change, and link vertically to a larger political movement.

Table 1.1: Types of Social Capital

Type of Network	Type of Social Capital	Represented By
Horizontal	Bonding	<ul style="list-style-type: none"> • Closed, homogeneous networks • Connections to like-minded nonprofits
Horizontal	Bridging	<ul style="list-style-type: none"> • Heterogeneous • Connections to diverse nonprofits
Vertical	Linking	<ul style="list-style-type: none"> • Access to power or status in network • Mostly homogeneous

The Heritage Foundation and the many other organizations that have adopted its operating model have excelled in their ability to tap into horizontal and vertical networks to influence the conservative debate on national legislation. On the state policy level, however, the situation may be quite different. The growing number of state think tanks on the political right operate in a smaller setting that may limit their ability to build and expand their networks. In addition, competition for funding or the nature of the state political environment may affect their ability or need to build networks.

Today, there is at least one nonprofit policy institution modeled after the Heritage Foundation—though operating independently—in each state. They adhere broadly to a mission of creating and advocating policy solutions based on the principles of limited government, rule of law, protection of personal property, and individual freedom. This mission aims to advance a free-market economy whereby the allocation of resources is dictated by supply and demand rather than regulation or subsidization by government. Within this intellectual framework, however, the groups can vary considerably in their specific beliefs and activities. For example, some institutions advocate for social issues such as traditional family values, while others focus only on economic issues.

Data indicate that the state-based free-market think tank movement is growing, but its comparatively small size—the Heritage Foundation’s 2008 revenue of \$71 million was more than that of all the state think tanks combined—has elicited little attention from researchers.

The purpose of this study is to examine the effectiveness of these state-level, free-market think tanks, using some of the same criteria that have been applied to national think tanks; evaluate their use of nonprofit networks and the types of social capital they

generate; and provide new insights into this relationship.

In the first phase of this mixed-methods study, quantitative data were used to ascertain which state think tanks were most effective in securing funding and garnering media attention. Two linear regressions predicted the expected revenue and media growth of these groups when such factors as organizational age, political environment, state population and economy, and competition for funding were taken into account. These data were compared to the verifiable results in funding and media penetration to illustrate those think tanks that either exceeded expectations or fell short.

In the qualitative phase, interviews were conducted with think tank executives to develop in-depth case studies on the use of networks for three organizations. The most effective think tank was selected for deeper study, as were two that presented surprising results in the quantitative stage. Finally, the two methods were integrated in the interpretation phase stage to draw conclusions and make recommendations.

This approach is subject to certain limitations. First, an organization's overall revenue may not necessarily reflect its organizational success. Like their national counterparts, free-market state think tanks do not seek or accept government grants; they receive funding from individuals, corporations, and independent foundations. It would be important to further evaluate their diversity of funding and, specifically, how much money comes from within the state and how much from outside the state. A broader base of support from within the state may indicate greater embeddedness of networks and the possibility of greater influence in the public policy sphere.

Likewise, access to traditional media and the ability to use that access to influence public policy may be far more limited for state think tanks than it is for national think

tanks. A study by the *American Journalism Review* found that the number of newspaper reporters covering state government in the nation's state capitals decreased 32 percent between 2003 and 2009. In New Jersey, for example, seven of the nine newspapers have laid off a portion of their reporting staffs. Other newspapers have closed entire bureaus for economic reasons. The study found that the reduction in news outlets and reporters has diminished the influence of the statehouse press. (Dorroh, 2009) Further, the lack of reporting on state issues could minimize the opportunity for a state think tank to be cited or to provide commentary in these newspapers.

Third, it is not known whether the social capital generated by horizontal and vertical networks is the source of effectiveness or whether effectiveness, as defined by budget size and media penetration, leads to the development of social capital. Network building and the social capital that ensues could be part of the natural evolution of an organization. As it becomes more skilled in raising funds, it builds more relationships, which provide more revenue, which allows it to reach even more people.

Finally, think tank leaders are engaged in myriad formal and informal networks that may produce social capital. These can range from institutional networks in which the think tank collaborates formally with other policy groups to informal connections developed through casual conversations with other think tank executives. This study does not necessarily place a value on the quality of each network beyond observing the existence or absence of networks in the case studies.

By evaluating the effectiveness of think tanks and how they build different types of social capital, this study is intended to test the hypothesis that the use of networks contributes to their effectiveness. This research is particularly relevant as the free-market

state think tank movement continues to grow in revenue and influence.

Overview of Subsequent Chapters

In Chapter 2, a brief history of the evolution of think tanks and their influence in the public policy sphere is provided. This is followed by a review of literature that is divided into three sections. It begins with the studies that describe how scholars have gauged think tank effectiveness. Next, it covers the studies on the institutions that have advocated conservative public policies and offers a distinction between these organizations and those that have a more liberal perspective. It ends with a review of work on networks, and on bridging, bonding, and linking networks in particular. A rationale and hypothesis are derived from these studies.

Chapter 3 covers the procedures and methodology for the quantitative and qualitative phases of the research. It provides details on the population studied, definitions of the dependent and independent variables that are considered, and an explanation of how data were collected. It is followed by a description of the statistical treatment of the data and the methodology for the qualitative research.

The results from the regression analyses are presented in Chapter 4 along with the reasons for selecting the think tanks for the case studies.

Chapters 5, 6, and 7 present the case studies of think tanks selected for in-depth interviews on their use of nonprofit networks and the types of social capital they generate.

Chapter 8 summarizes the study, presents findings from the case studies, tests the hypothesis, provides conclusions, and offers recommendations for future study.

CHAPTER 2 LITERATURE REVIEW

Introduction

Quantifiable measurements that signify think tank effectiveness remain elusive, despite multiple studies on the topic. This is partly due to the complexity of the political process. In order to introduce new ideas and change public policy, think tanks conduct research, brief legislators, and work to change public opinion through media attention. Yet a think tank could do everything “right” in terms of advancing an issue without generating any tangible result if no legislation is adopted based on its ideas. Further, when policy success is achieved, it has often been years in the making. For instance, in 2002, the Heritage Foundation was credited with advancing the policy that led to America’s withdrawal from the Anti-Ballistic Missile Treaty, which paved the way for the deployment of missile defenses. But this policy change was realized only after a 20-year effort by Heritage’s defense, foreign policy, and government relations experts. The 1996 reform of the welfare system is a similar example of a policy change that succeeded only after a multi-year commitment of time and resources by numerous parties.

Another challenge is that a think tank may define success by making a policy “less bad.” That is, it uses its influence with legislators to deter the enactment of certain provisions in a legislative proposal. Results like these are rarely tracked and virtually impossible to gauge.

In order to demonstrate progress to the public and to donors, think tanks often use their marketing and fundraising activities as evidence of more immediate impact. There are reasons to conclude that these measurements have validity. First, effective marketing

programs put information in the hands of policymakers and journalists, who are central to a think tank's mission of disseminating ideas and expertise, and donors are favorably impressed when the institution they support is quoted in a prominent newspaper or television program. Media citations are a tangible expression of a think tank's long-range work. Second, media penetration is most dependent on budget size (Rich and Weaver 2000), so the organization's ability to raise funds is critical. Marketing and fundraising are therefore often intertwined.

Securing financial support from a variety of sources has other benefits as well. It enables an organization to conduct more policy research, hire professional staff of higher caliber, and produce more products for its major constituencies. In some cases, an organization receives enough resources to establish a physical presence, in the form of its own offices or building, near the seat of government. The greatest advantage of funding diversity may be that the think tank has the freedom to take independent positions on issues that could be controversial. (Weidenbaum, 2009) In a scenario where a think tank received all its funding from the pharmaceutical industry, for example, it might be unwilling to promote health reform policy ideas that would be unfavorable to that business for fear of losing financial support; but if the institution secured many contributions from varied sources, it could act independently and decline a contribution or resist pressure from outside influences.

At the state level, the problems of measurement may be even more acute, especially for think tanks that have not been in existence long enough to build a history of achievement. Others must contend with an unfavorable political environment that makes the adoption of conservative policy prescriptions unlikely. In Maryland, for instance, the

governor is a Democrat as is the majority of the General Assembly. Conservative think tanks operating in such states have fewer opportunities for definitive victories. They need to derive success from working with legislators in the minority position or with Democratic lawmakers whom they can persuade.

The following literature review begins with a brief history of think tanks in America and the evolution of free-market, state-based organizations. Next is a review of research on think tank effectiveness with particular attention to politically conservative groups. Then the research on nonprofit networks in generating social capital is covered. The review ends with a discussion of hypotheses that could be derived from the studies.

History of Think Tanks

The marketing of ideas in the media has not always been an activity carried out by think tanks. The first wave of think tanks was an outgrowth of the Progressive Era when America was undergoing many social and political changes brought about by new scientific advancements and other developments. The Institute for Government Research was formed in 1916 to promote the functional efficiency of government and address budgetary reform. Later renamed the Brookings Institution, it advised government agencies on how to become more efficient in implementing policies and allocating resources, and it is still in existence today.

Between the two world wars, the need for economic measurements increased, and experts started playing a greater role advising the presidencies of Herbert Hoover and Franklin D. Roosevelt. After World War II, policymakers recognized that they required outside experts to advise them on the economics of sustaining employment and production, as well the technology for Cold War warfare. This led to the formation of

RAND, a nonprofit corporation that provided analytical expertise on security issues to the government on contract, and introduced the second phase of policy institutions. (Smith, 1991)

In 1943, the first conservative think tank in Washington opened its doors. The American Enterprise Association—later renamed the American Enterprise Institute—was akin to the Brookings Institution in its scholarly approach to public policy research. According to the history on its Web site (www.aei.org/history), it was founded to be conservative in spirit but determinedly nonpartisan and nonpolitical. It sought to “express no opinion of its own” and produce “accurate, impartial, and objective research.” Nonetheless, when William J. Baroody took the helm in 1954 after a stint at the U.S. Chamber of Commerce, he clearly positioned the organization as the conservative answer to liberal Brookings. (Smith, 1991)

Under the administrations of John F. Kennedy and Lyndon Johnson, experts in government proliferated, especially in the social sciences. They were instrumental in advancing social initiatives that were the basis for Johnson’s “Great Society” and an expansion of government. (Rich, 2004) The response on the right was a new type of think tank—typified by the Heritage Foundation in 1973—that sought to insert policy solutions through the legislative process when they could have the most influence, which meant actively marketing ideas to lawmakers, the media, and the public. Prior to this, in consideration of their tax-exempt status, think tanks were reluctant to provide specific ideas and guidance to Members of Congress while legislation was being debated. Instead, they released academic reports after the measure had been voted on. In contrast, the Heritage Foundation—joined four years later by the libertarian Cato Institute—sought to

sharpen the political debate by getting policy prescriptions to Congress and opinion leaders earlier in the legislative process through a variety of marketing tactics. The policy groups in this third wave were notable for having decided opinions of their own, not just for objective analysis, and were not afraid to advocate their positions. (Smith, 1991)

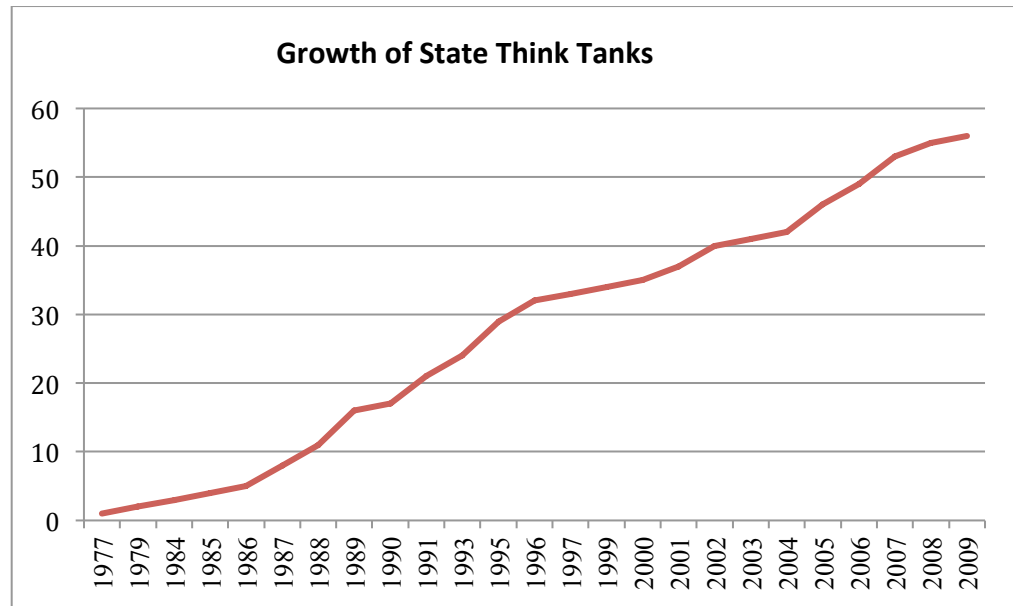
In the late 1970s, the Pacific Research Institute appeared on the scene in California. It was the first public policy institution to be created at the state level specifically to advocate a limited role for government and market-based economic policies. Over the next decade, other state groups were established and often emulated the Heritage model in terms of both research and advocacy. Though the state think tanks had no formal organizing structure, they were informally connected through the Madison Group, a loose confederation named for the Madison Hotel in Washington, D.C., where they first met.

At the advent of the 1990s, 23 free-market think tanks of various sizes were operating in the states. Those involved in the Madison Group felt that a more official association was needed to support and build the burgeoning state think tank movement, and in 1992, State Policy Network (SPN) was formed with seed money from the late businessman and philanthropist Thomas A. Roe. At the time, Roe was a trustee of the Heritage Foundation and envisioned a future in which each state would have an institution capable of advancing conservative policy at the state level as effectively as Heritage did on the national level. (Miller, 2006)

State Policy Network has become a powerful facilitator over the years, with 2008 revenue of \$4 million. Its name itself implies that it is building the relationships, or

networks, that allow groups to collaborate. It has also helped to spur the creation of think tanks in all 50 states and train their leadership and staff. (See Chart 2.1.)

Chart 2.1: Growth of Free-Market State Think Tanks



In spite of their similar missions, the state-level free-market think tanks act independently of each other and do not always share the same agenda with other state or national think tanks. For instance, the Independence Institute of Colorado has a strong libertarian bent, which means it focuses almost exclusively on fiscal policy such as tax reform. Meanwhile, the Sutherland Institute in Utah addresses economic issues but also advocates social policies supporting traditional families. Also, few state think tanks concentrate on national issues such as homeland security, preferring to emphasize the issues on which they can have the most influence, such as education and welfare reform.

Of course, market-oriented think tanks are not the only ones operating in the states, but progressive—or liberal—groups have been slower to get started and have not been

sustained financially the same way that free-market groups have been. A 1998 article found that private liberal foundations, in particular, did not turn their attention to policy battles in the states until the early 1990s when the free-market state think tank movement was well underway. (Callahan, 1998) Subsequently, a study by the Open Society Institute reported on the growth of liberal state policy groups backed by private foundations and individual donors. The report cited what free-market groups have asserted since the 1970s: that the states are where battles are being waged on health care coverage, the minimum wage, and other issues once thought of as only federal issues. (Kallick, 2002) Within two years of this report's publication, many of the liberal state groups disbanded in the wake of the Democrats' failed attempt to retake the presidency in 2004. (Miller, 2006)

Today, there are liberal think tanks in Alaska, Maryland, North Carolina, and Washington, among other states, but they differ from the conservative institutions in that they are not always 501(c)(3) organizations and have decidedly partisan agendas. According to the Capital Research Center, a conservative watchdog group, however, there is a new challenge to conservative preeminence with the arrival of the Democracy Alliance, a financial clearinghouse funded by George Soros to support a loosely knit group of liberal nonprofits, think tanks, media outlets, leadership schools, and activist groups. Since its founding in 2003, the Democracy Alliance has contributed more than \$100 million to these causes. (Vadum and Dellinger, 2008) Much like SPN on the political right, the Alliance seems to be attempting to harness the power of its network to influence policy outcomes for liberal issues.

Literature Review

Think Tank Effectiveness

As the number of think tanks has grown, scholars have asked what makes them effective or not effective in attempting to influence policy decisions. Many studies have focused on their media marketing abilities and budget size.

In *The Idea Brokers: Think Tanks and the Rise of the New Policy Elite*, Smith (1991) acknowledges that the role of marketing—often through the media—has dramatically changed think tanks since the mid 1970s, as well as the public’s perception of them. In fact, he regards this as the most significant factor in their development. In the daily competition for attention and funding, think tanks have become skilled in securing radio and television interviews and placing commentary in newspapers to promote their ideas. But Smith is unconvinced that marketing tactics succeed in creating lasting influence on the policymaking process. He contends that any short-term gains are offset by the loss of academic rigor and serious debate. Smith believes that real influence lies in educating and training the next generation of the policy elite and placing them in positions of power in government. Certainly, many former experts from liberal and conservative think tanks have populated the Democratic and Republican presidential administrations.

While Rich (2004) also questions the correlation between marketing and effectiveness, he arrives at slightly different conclusions. In *Think Tanks, Public Policy, and the Politics of Expertise*, he evaluates the impact of policy expertise by studying two key constituencies of think tanks: journalists and congressional staff. He argues that both are central actors in the policymaking process and that both depend on the expertise of

think tanks to understand the issues at hand. His surveys showed that while non-ideological think tanks were deemed to be more credible generally, think tanks as a whole were considered to be influential in the policymaking process by the media and legislative personnel. Moreover, market-oriented think tanks on the political right have been the most successful in conveying their ideas and expertise in the national print media.

Berry (1999), in *The New Liberalism: The Rising Power of Citizen Groups*, explains that advocacy organizations highly prize the placement of commentary in major newspapers based on the belief that policymakers and their staffs read them. In addition, the pieces generally contribute to the conversation on evolving policy discussions. Berry studied all issues of the *New York Times* and the *Wall Street Journal* for 295 days in 1995 and concluded that think tank experts wrote nearly 55 percent of all op-ed columns.

In *Do Think Tanks Matter? Assessing the Impact of Public Policy Institutes*, Abelson (2002) compares and contrasts major U.S. think tanks from across the ideological spectrum with those in Canada and concludes that American think tanks are much more embedded in the policymaking process than Canadian think tanks are. He found that the U.S. policy institutions that attract more media attention are also more likely to have their experts invited to testify before Congress. They are also considered to be more influential in the eyes of policymakers and opinion leaders. Abelson cites the earlier work of Rich and Weaver, who studied the media visibility of 51 think tanks in six national newspapers over a period of seven years. They state that media penetration is often used as a proxy for organizational success because lawmakers are known to be influenced by what they read and watch in the news media. (Rich and Weaver, 2000)

Conservative Think Tanks

There is general agreement among observers that conservative think tanks have been more successful than their liberal counterparts for reasons that vary from their marketing skills to their ability to influence policymakers to their use of networks. Organizational characteristics such as cohesive vision, management capability, issue coverage, and ability to leverage resources also play a part.

An article in *The Economist*, “The Charge of the Think Tanks” (2003), reviews several national and state-based free-market think tanks and concludes that they are better organized and more strongly committed to their cause than left-leaning groups are. Like Rich’s book, this article references these groups’ zeal for marketing, which many interpret as an intent to promote ideology rather than to formulate new ideas. In addition to strong fundraising and business-like operations, the article cites “a willingness to collaborate” as a reason for the growth and influence of these think tanks.

In *Think Tanks and Civil Societies: Catalysts for Ideas and Action* (McGann and Weaver, 2002), the Heritage Foundation’s president, Edwin J. Feulner, cites several factors in its success. As noted in many other studies (Abelson, 2002)(Rich, 2004)(Smith, 1991), Heritage’s marketing model introduced a new method for promoting ideas in Washington. Instead of publishing lengthy academic papers for a small group of intellectuals, Heritage developed short briefs and focused on getting its materials into the hands of policymakers and the media. The think tank continues to tout its media penetration today as evidence of its impact. A second factor is Heritage’s large income base. Not only does it have the highest revenue among conservative think tanks (\$65

million in 2007), but it also is the most broadly supported with more than 625,000 individual donors.

In addition to individual contributors, think tanks rely on private foundations for funding, as cataloged in a report by the National Committee for Responsive Philanthropy. This study analyzed the giving patterns in 2000 of 79 conservative foundations with combined assets of \$103.7 million. It concluded that these funders and the think tanks they support had a “tremendous impact” on the policy decisions of the Administration and Congress, yet the average foundation grant size was just \$52,788. (Krehely et al., 2004)

Rich came to a similar conclusion. He discovered that conservative or free-market think tanks were more effective than liberal ones, but not because they received more funding. Private foundations that supported liberal public policy groups outspent conservative funders by three to one. (Rich, 2005) The reasons for conservative effectiveness were that the groups and their funders had certain advantages. Right-leaning think tanks tended to research a broad range of issues, which mirrored how the legislative and executive branches operated. On the left, liberal groups organized around specific issue areas, which may have limited their overall influence. Conservative funders, meanwhile, were willing to provide general operating support, which helped think tanks to build the capacity of their institutions. Liberal funders were more project-focused in their grants, and this has limited organizational growth. Perhaps the fundamental difference, according to Rich, was that liberal grantors sought to fund neutral, unbiased research, while conservative funders were supportive of an ideological agenda that brought about policy change.

A second report from the National Committee for Responsive Philanthropy studied 12 of the largest conservative foundations and their grantmaking from 1992 to 1994 to illustrate how the conservative policy agenda in America has been formulated and advanced. It found that conservative philanthropists began with a clear long-term vision and built strong institutions by investing in the think tanks' marketing activities, funding the development of intellectuals and policy leaders, and supporting a wide range of organizations. (Covington, 1997, 2004)

Bai (2007) also describes the unified message or "argument" of conservatives (lower taxes, limited government, strong national defense, traditional American values), as well as the commitment of funders to support the communication of ideas. *The Argument* (Bai, 2007) details the liberal political ascent in the early 2000s and how Democrats emulated the conservative model in their successful bid to retake the House and Senate in 2006. Conservatives, through think tanks and other outlets, have built a "message machine" whereby they have invested in the capacity to make arguments forcefully. However, Bai's assertion that "the... conservative ideology that has transformed Washington over the past 25 years has been soundly discredited" may be an overstatement.

Finally, the authors of *The Right Nation: Conservative Power in America* (Micklethwait and Wooldridge, 2004) state that one reason for the success of right-leaning groups is their ability to flood the policy marketplace with both products and ideas that cover a broad range of issues to put pressure on policymakers and advance their agenda. They estimate that conservative think tanks spent \$1 billion promoting their ideas in the 1990s. Micklethwait and Wooldridge found that the Heritage Foundation and

other think tanks operate with the discipline of businesses. Their “product” is furthering conservative principles. These groups have also built funding mechanisms whereby they have become reliant on contributions from thousands of individual donors rather than a few foundations or corporations.

The Role of Nonprofit Networks

A network consists of a set of individuals or organizations that are linked through social relationships such as familial or professional ties, friendships, or information exchange. (Jordan, 2006) According to social capital theory, the trust built through social networks increases the productivity of individuals and organizations in a community, especially when the actors are engaged or “embedded” in dense networks of reciprocal social relations. (Putnam, 2000)

From an organizational perspective, both for-profit and nonprofit firms benefit from building strong social networks in everything from enhancing program delivery to ensuring their survival. (Provan and Isett, 2005) In the business world, interorganizational networks—or voluntary alliances between companies—have been shown to provide many benefits, from increasing the flow of information to enhancing collaboration on product development to creating unique economic opportunities. (Uzzi, 1996, 1997) Gulati’s research on the patterns of network formation found that alliances occur based on direct and indirect prior ties within a social network. These ties provide information about the reliability and capabilities of potential partners, and the relationships or networks formed are crucial to the success and survival of firms. (Gulati, 1995, 1999)

Social networks may be built horizontally or vertically, and each generates different types of social capital. Like human capital or physical capital, social capital has

productive value for individuals as well as for groups because it entails mutual obligation, trust, and responsible action. According to Passey and Lyons (2006), nonprofit organizations represent both the “social glue” and “social oil” in its reproduction: social glue because nonprofits are networks of individuals that voluntarily bond themselves together to pursue shared goals. This is referred to as bonding social capital. Bridging social capital is the social oil that facilitates interactions between different groups of people and organizations. In their survey of Australian nonprofit organizations, they concluded that nonprofits engaged their networks regularly to add to their stocks of social capital.

In *Bowling Alone: The Collapse and Revival of American Community*, Putnam described how horizontal networks help form bonding and bridging social capital within communities. Bonding ties are forged in and between generally equal, homogenous groups that share a common social identity or similar interests. This relationship is inwardly focused and characterized by a high degree of trust. Examples include fraternities or book clubs. (Putnam, 2000)

Bridging social capital, also generated from horizontal networks, is outward looking and typified by links across different social groups. A bridging network offers benefits to its members, but it also promotes the reciprocity and social integration that help society by creating links to the external environment and promoting information diffusion. (Putnam, 2000) This draws on the seminal research of Granovetter regarding the strength of weak ties in networks that perform an important bridge-building function in the dissemination of ideas and information. While individuals with strong personal ties or bonds tend to be more similar in various ways, their ideas are rarely spread beyond

their cliques. Weak ties, on the other hand, give people access to information and resources beyond their immediate social circle. (Granovetter, 1973 and 1983)

Bridging social capital has generally been thought to be more beneficial than bonding capital for nonprofit firms because it provides a group with external connections that could aid in the exchange of information and the attainment of financial resources. (Ashman, Brown and Zwick, 1998) However, not all nonprofits or individuals form these ties. Guo and Acar studied nonprofit organizations that work in partnerships to understand why some groups develop formal collaborative activities while others collaborate more informally. Based on a survey of 95 urban charitable organizations, they concluded that more formal networking occurs when the organization is older, has a larger budget size, receives government funding but relies on fewer government funding sources, and has board connections to other nonprofit groups. (Guo and Acar, 2005)

Vertical networks generate a third type of social capital: linking social capital. This is fostered by ties between individuals and organizations at different levels of influence within a network and is often facilitated by intermediary institutions. (Passey and Lyons, 2006) The central difference between this type of social capital and bridging and bonding social capital is that the actors are unequal in their access to power or resources. (Szreter, 2002) Linking capital may give an organization the ability to interact with groups across institutional power structures to access to national lawmakers or the media, for example.

In a study of civil society resource organizations that generated funds and made grants to nonprofit organizations in multiple countries, scholars (Ashman, Brown and Zwick, 1998) determined that both bonding and bridging activity are essential for the

formation of social capital. The strong ties that occurred from bonding with homogenous entities promoted social cohesion, and the weak ties developed between heterogeneous groups paved the way for access to new resources. The authors specifically cite the role of the founders of these organizations and the need for those with strong-tie networks to develop weak ties to new funding partners. Likewise, the leaders with weak-tie networks needed to strengthen their bonds to like-minded partners to build legitimacy in their local environments.

Coffé and Geys (2007) provided a new methodology for identifying an organization's ability to form bonding or bridging social capital based on the socioeconomic background of its members. Prior research had quantified an organization's capacity to bond based on the number of members in a group with additional memberships, and thus showed a bias toward larger organizations. Coffé and Geys found that some organizations will be naturally more heterogeneous if there is a broad representation of socioeconomic groups among its members.

Finally, Wollenbaek and Selle (2007) delved into the origins of social capital and refuted Putnam's argument that social capital is built most effectively by regular face-to-face interaction between individuals. Instead, they suggest that non-political intermediary institutions have a pivotal role in linking citizens to the political system and individuals to society. The trust required for social capital to flourish may emanate from observing successful and visible civil society institutions operating to promote the common good.

National think tanks also utilize horizontal and vertical nonprofit networks to disseminate their ideas, find new funding sources, advance their agenda, and share expertise. Feulner referred to the Heritage Foundation's networks and their ability to

“harness the power and effectiveness of other organizations” as one of the three most important elements of Heritage’s success after its marketing and fundraising capabilities (McGann and Weaver, 2002) Specifically, he pointed to the Resource Bank, an annual meeting where attendees can receive training and expertise on policy, marketing, and fundraising. According to the Heritage Foundation’s Web site, the 32nd meeting, held in April 2009, drew “more than 600 think tank executives, public interest lawyers, policy experts, and elected officials from around the world....” This event generates both linking and bonding social capital as groups connect to the ideas and issues of the larger conservative movement and build relationships with organizations that share the same mission. Likewise, Feulner’s colleague Bridgett Wagner, who oversees this project, wrote that growing a network is a measure of impact in itself. (Wagner, 2004)

In *Forces for Good: The Six Practices of High-Impact Nonprofits*, Crutchfield and Grant (2008) strongly tie networks to the effectiveness of national think tanks. The authors profile 12 exemplary organizations and outline the key factors that contribute to their success. The groups have diverse missions and range from a policy institute (Heritage Foundation) to a museum (Exploratorium) to a hunger relief group (Share Our Strength) In the course of their research, which encompassed hundreds of nonprofits, the authors had to decide how best to gauge the impact of the groups being studied, eventually settling on several criteria including the scale of impact, sustained impact for at least 10 years, budget size, age, and issue areas. One of their key findings was that high-impact nonprofits nurture networks of allies beyond their immediate organization to leverage assets and bring about change. In the case of the Heritage Foundation, it formed the Resource Bank in 1977 to provide a network for the then-handful of state and national

conservative think tanks. Beyond this annual gathering, Foundation staff collaborate regularly with national and state organizations to share knowledge and resources and to develop the talent to lead organizations in the future.

In recent years, Heritage's annual Resource Bank meeting also facilitates the conservative legal movement, which is a network of public interest law firms that has developed in parallel to the think tank movement. Steve M. Teles (2008) details its evolution since the 1970s, which was in response to the growing number of liberal-leanings of judges, professors, and lawyers and the expansion of liberal public interest law firms, in his book, *The Rise of the Conservative Legal Movement*. However, unlike the think tanks that purposely built networks, the conservative legal movement was formed through the shared intellectual interests among the actors and the creation of a network was a by-product of this interaction.

Covington (2004) had similar observations to Crutchfield and Grant regarding the activities that foster state and regional networks. She found that national think tanks often influence state-level policy decisions and support state-level groups by convening regular meetings for state public policy experts, and the free-market movement has built networks for communicating policy ideas and proposals to multiple constituencies, including national and state lawmakers and the media.

Miller (2007) reported that State Policy Network has consistently encouraged its affiliated groups to share information, research, and ideas. A report from a progressive think tank, Political Research Associates (Clarkson, 1999), determined that the state think tank movement, led by SPN, leverages resources between the national and state levels, shares personnel, and collaborates on policy research and ideas. The author contends that

a “quiet revolution” is underway as these networks build substantial platforms for their public policy agendas.

Aside from the work of Miller and Clarkson, however, there has been insufficient study of the role of networks in the effectiveness of state-based free-market think tanks. It is not known how nonprofit networks contribute to the influence of state think tanks and, if they do, what exactly they contribute. Nor does research exist as to the type of social capital that state think tanks generate. This study attempts to address these issues.

Alternative Hypotheses

One hypothesis is that state think tanks, unlike national ones, are able to secure funding and raise media attention without the benefit of extensive connections. They are in less need of nonprofit networks because they work on localized issues in smaller geographic areas. For instance, the education policy solutions proposed by a state think tank in Kansas may vary greatly from what is formulated in California by a different think tank. Therefore, the state think tanks find less value in building coalitions or networks with other nonprofits to address this issue. In addition, a think tank’s funding and media sources could be extremely localized as well, so the contribution of networks may be insignificant.

Another hypothesis is that the leadership of a state think tank dictates its success in securing media or funding, rather than the formation of nonprofit networks. The skills and temperament of the executive director may be a critical factor in effectiveness if he or she is an able spokesperson and fundraiser.

Rationale and Hypothesis

The purpose of this study is to test the hypothesis that networks add value to the work of state-level, market-oriented think tanks.

This study will test this proposition through a two-stage, mixed-methods study. First, quantitative research will be used to predict the effectiveness of state think tanks in raising media visibility and money, taking into account five independent variables: organizational age, state population, political environment, state economy, and funding competition. In the second phase of the study, three think tanks that performed very well, average, and poorly respectively were studied using qualitative analysis to ascertain how their networks contributed to their performance.

In terms of the independent variables, the age of the organization is significant from a cursory review of revenue growth over time. Generally, the longer a think tank is in existence, the greater its overall revenue, but in its formative years, a younger think tank may grow more rapidly than a more established group.

The state's population was included to determine whether think tanks in states with a greater number of residents had an advantage in raising funds.

Since policy institutions and their work are intrinsically tied to lawmakers, the political environment in which the state think tanks operate was assessed. One might surmise, for instance, that conservative think tanks have more success in states dominated by the Republican Party, which generally shares their ideology.

The economy of each state was considered by using the proxy of unemployment rates to ascertain whether a declining financial outlook in the period studied may have an effect on charitable contributions that a think tank receives.

Finally, the level of competition within the state from similarly oriented groups may have an impact on a group's ability to raise funds or gain media exposure.

CHAPTER 3 PROCEDURES AND METHODOLOGY

Introduction

Previous studies have found that a think tank's influence and effectiveness are often dictated by the organization's ability to earn respect for its intellectual products among government officials and the media. In addition, the ability to secure sufficient resources from a diverse array of funders is essential to garnering media attention, building institutional capacity, and preserving a think tank's independent views. (Rich and Weaver, 2000)(Weidenbaum, 2009)

More recently, observers have discovered that the nonprofit networks utilized by national conservative think tanks also contribute to their success. (Crutchfield and Grant, 2008) Through these formal and informal relationships, the think tanks communicate ideas, develop leadership, share resources, and bring about policy change.

The use of nonprofit networks by the 56 state-based conservative or free-market think tanks is less well known. While all 56 groups are members of State Policy Network—an umbrella organization that works to form and support these policy institutions—each think tank operates independently of the others and is engaged in fostering policy change in its own state.

Applying the existing research on the effectiveness of national think tanks, the first phase of this study uses the quantitative data of media penetration and revenue between 2006 and 2008 to measure the influence of state think tanks and identify which are more or less successful. Five factors were considered to control for significant variations among the groups: organizational age, competition for funding, and the state's population, political environment, and economy.

The second phase of the study measures the use of nonprofit networks through qualitative research in the form of telephone interviews to determine whether there is a difference between the more effective and less effective think tanks regarding their embeddedness in nonprofit networks and ability to generate social capital. The hypothesis being tested is that the think tanks that are more successful in raising funds and securing media attention are also embedded in multiple nonprofit networks.

Population

“Free-market state think tank” describes each of the 56 policy research institutes that concentrate on state public policy, are 501(c)(3) charities, and promote policies that support the principles of limited government, lower taxes, and individual freedom. These institutions are distinct from their progressive or liberal counterparts in their missions and policy prescriptions, and they neither seek nor accept government funding. Instead, their revenue is derived from a combination of foundation grants and gifts from individuals and corporations. Their combined 2008 revenue was more than \$61 million, and individual think tanks’ annual revenues ranged from \$103,000 to \$3.6 million. (See Table 3.1.) Further, all are members of the State Policy Network, whose mission, according to its Web site (www.spn.org), is “to improv[e] the practical effectiveness of independent, non-profit, market-oriented, state-focused think tanks.”

Table 3.1: Free-Market State Think Tanks

State Think Tank	State	Year Founded	2008 Revenue
Institute of the North	AK	1995	\$842,000
Alabama Policy Institute	AL	1989	1,125,271
Arkansas Policy Foundation	AR	1995	113,332
Goldwater Institute	AZ	1988	3,053,985
Pacific Research Institute	CA	1979	3,656,132
Independence Institute	CO	1985	1,823,132
Yankee Institute	CT	1984	391,382
Caesar Rodney Institute	DE	2008	n/a

State Think Tank	State	Year Founded	2008 Revenue
James Madison Institute	FL	1987	920,244
Georgia Public Policy Foundation	GA	1991	490,011
Grassroot Institute of Hawaii	HI	2001	537,989
Idaho Freedom Foundation	ID	2009	n/a
Illinois Policy Institute	IL	2002	646,069
Indiana Policy Review Foundation	IN	1989	179,759
Flint Hills Center for Public Policy	KS	1996	353,302
Bluegrass Institute for Public Policy Solutions	KY	2004	552,967
Pioneer Institute	MA	1988	1,596,089
Maryland Public Policy Institute	MD	2001	304,847
Free State Foundation	MD	2007	521,843
Calvert Institute for Policy Research	MD	1995	n/a
Maine Heritage Policy Center	ME	2002	1,146,664
Mackinac Center for Public Policy	MI	1987	3,664,400
Center of the American Experiment	MN	1990	849,449
Freedom Foundation of Minnesota	MN	2006	135,540
Show-Me Institute	MO	2005	1,739,622
Mississippi Center for Public Policy	MS	2003	537,436
Montana Policy Institute	MT	2006	380,932
John Locke Foundation	NC	1989	3,245,499
John William Pope Civitas Institute	NC	2005	1,755,000
North Dakota Policy Council	ND	2007	230,008
Platte Institute for Economic Research	NE	2007	103,862
Josiah Bartlett Center for Public Policy	NH	1993	247,127
Center for Policy Research of New Jersey	NJ	2002	137,209
Rio Grande Foundation	NM	2000	322,949
Nevada Policy Research Institute	NV	1991	1,004,003
Manhattan Institute	NY	1977	12,603,000
Empire Center for New York State Policy	NY	2005	n/a
Buckeye Institute for Public Policy Solutions	OH	1989	750,479
Oklahoma Council of Public Affairs	OK	1993	1,482,107
Cascade Policy Institute	OR	1991	997,550
Allegheny Institute for Public Policy	PA	1995	369,544
Commonwealth Foundation	PA	1988	890,778
Ocean State Policy Research Institute	RI	2007	201,865
South Carolina Policy Council	SC	1986	934,823
Great Plains Public Policy Institute	SD	1999	n/a
Tennessee Center for Policy Research	TN	2005	442,032
Texas Public Policy Foundation	TX	1989	3,181,346
Sutherland Institute	UT	1995	1,065,155
Thomas Jefferson Institute	VA	1996	314,512
Virginia Institute for Public Policy	VA	1996	307,503
Ethan Allen Institute	VT	1993	779,970
Washington Policy Center	WA	1997	1,207,542
Evergreen Freedom Foundation	WA	1991	2,463,924
Wisconsin Policy Research Institute	WI	1987	782,563

State Think Tank	State	Year Founded	2008 Revenue
Public Policy Foundation of West Virginia	WV	2006	165,467
Wyoming Liberty Group	WY	2008	313,714
TOTAL REVENUE			\$61,866,928

With the exception of three groups (the Show-Me Institute of Missouri, the Tennessee Center for Policy Research, and the Free State Foundation of Maryland), think tanks founded after 2005 were eliminated from the study because insufficient financial data existed for the years 2006 through 2008. The groups eliminated were the Caesar Rodney Institute (Delaware); Idaho Freedom Foundation; Wyoming Liberty Group; North Dakota Policy Council; Platte Institute for Economic Research (Nebraska); Ocean State Policy Research Institute (Rhode Island); Freedom Foundation of Minnesota; Public Policy Foundation of West Virginia; Empire Center for New York State Policy; and Montana Policy Institute. Three other think tanks were eliminated because the scope of their work extended beyond the state: John William Pope Civitas Institute (North Carolina); Manhattan Institute (New York); and Institute of the North (Alaska).

Finally, four think tanks founded prior to 2005 were removed due to lack of financial data for one or more years: the Calvert Institute for Policy Research (Maryland); Indiana Policy Review Foundation; Great Plains Public Policy Institute (South Dakota); and Ethan Allen Institute (Vermont). Data from the remaining 39 think tanks formed the basis of this research.

Data Collection and Treatment

Quantitative Data

Dependent Variables

Revenue: All the state think tanks studied are 501(c)(3) organizations under IRS rules. They are required to submit a Form 990 tax return annually provided that they have revenues of \$25,000 or more. (In 2010, the threshold increased to \$50,000, and organizations with less revenue are required to file Form 990-N to retain their tax status.) Publicly available tax returns from 2006, 2007, and 2008 were accessed for each organization to capture data on their annual revenues. While there can be inaccuracies on these forms, they are not enough to discount the findings because the errors are not expected to be systemic.

Media Penetration: Media penetration was determined for each state think tank by conducting a search of NewsBank results (NewsBank, 2010) under the think tank's name for the years 2006, 2007, and 2008. NewsBank compiles the text of more than 2000 local, regional, and national newspaper titles, and the research generated results for all of the policy groups. While some media references may have been omitted from the totals, these data are believed to be generally accurate. NewsBank results correlated closely with the self-reported media exposure of the Maryland Public Policy Institute, for example.

Independent Variables

Organizational Age: The age of an organization may have an effect on both media penetration and funding. As a group matures and becomes more established in a state, it may gain more visibility among the media, acquire greater expertise on the issues, attract better-qualified staff, and improve its fundraising techniques. The year the

organization was founded was determined from the IRS ruling date reported by the Urban Institute's National Center for Charitable Statistics (www.nccs.org).

State Population: The population of the state may positively affect the availability of funds for state think tanks. A think tank in a heavily populated state may have many more potential donors from whom to seek support. On the other hand, a think tank in a sparsely populated state may have more success in gaining attention for its work if there is less competition from other organizations. However, it is not known what percentage of think tank funding comes from donors within the state, where population may be a factor.

State resident numbers were accessed from the U.S. Census Bureau's Web site at www.census.org. In the study, the states were characterized as large, medium, or small. Large states have populations of 10 million or more, medium states have populations of more than 5 million but less than 10 million, and small states have populations of less than 5 million residents.

In order to measure state population, a series of dummy variables were used in which each observation of state size has the value zero or one. For example, California had the value of one under the variable "Large State" but the value of zero in the variables "Medium State" and "Small State." The regressions computed "Large State" and "Medium State." This calculated how the large states are different from small states and how the medium states are different from small states.

Political Environment: The political environment in which a think tank operates can change dramatically from year to year. In order to present general trends, this study utilized national data between 1996 and 2008. Specifically, it identified a state as being

red, blue, or purple based on the results of the last four presidential elections. This provided a broader snapshot of a state's political leanings over time. Republican candidates carried red states in three to four of the last four presidential elections, Democrats carried blue states, and purple states were carried twice by each party. This designation could be limiting because it does not take into account the political makeup of each state's legislative body. Further, it cannot be assumed either that a free-market state think tank has influence only in a political environment dominated by Republican lawmakers or that it exercises a particular kind of influence. As with population, a series of dummy variables were used. Texas, for instance, was assigned the value of one under the variable "Red State" and the value of zero for each of the variables of "Blue State" and "Purple State." The regressions used "Red State" and "Blue State." These evaluated how red states are different from purple states and how the blue states differ from purple states in relation to funding.

State Economy: A state's declining financial vitality in the period under study may have a negative impact on funding. According to *Giving USA's Annual Report on Philanthropy*, charitable giving from individuals rose by 1.0 percent in 2006 and 2007 but decreased by 6.3 percent in 2008. Based on reports from the Foundation Center, grants from independent foundations increased each of these three years but at a decreasing rate: 14.6 percent in 2006, 13.2 percent in 2007, and 0.08 percent in 2008.

State think tanks receive the majority of their revenue from foundation grants and individual donors, but the allocation between these two sources of revenue does not have to be reported on the organizations' annual tax return. Thus, a think tank that is heavily

dependent on foundation giving may have been less affected financially than were think tanks that rely on individual donors for the majority of their support.

In order to control for a potential downturn in contributions as a result of economic changes, this study uses the growth in the state unemployment rate for 2006 through 2008 as a proxy for the changes in the economy and the likelihood that individual donations will have been affected in a corresponding manner.

Funding Competition: State think tanks are in competition for funding from national as well as state organizations that have similar policy agendas. To ascertain the level of funding competition, this study utilized Policy Experts (www.policyexperts.org), the most comprehensive online database of conservative and/or free-market policy institutions and individuals, to determine the number of self-described policy organizations operating in each state.

It should be noted that this data source is subject to certain limitations. It counts the number of groups in the state but does not evaluate their level of resources. Therefore, a state think tank with a small number of competitors may actually face more challenges raising money if those competitors are well funded. Also, the data do not reveal whether the competitor groups receive a majority of their funding from sources within the state or not. Finally, the data do not take into account national organizations that are fundraising at the state level. The Heritage Foundation and the Cato Institute are just two examples of groups that fundraise nationwide and may compete for contributions with state think tanks. As described in the case studies in Chapters 5–7, some insight into this relationship was sought by examining the Heritage Foundation’s contributions revenue in the three states where the think tanks selected for case studies are located.

Qualitative Data

Nonprofit Networks: A network is described as a set of people or groups that are connected by social relationships such as friendship, business alliances, a common third party, or information exchange. (Gulati, 1999) Organizations that are embedded in a diverse number of networks have opportunities to cooperate and to foster trust and commitment among the firms within the relationship. (Guo and Acar, 2005) This could produce linking, bonding, and bridging social capital.

Linking Social Capital: Linking social capital refers to relationships developed in a vertical network between lower and higher levels of one or several organizations. An intermediary institution may facilitate these connections and thereby often help an organization to access more influential actors, such as national media. (Passey and Lyons, 2006) State think tanks rely on vertical networks to connect them to the larger conservative movement, as well as to ideas, financial resources, training, and experts. An example of this is the State Policy Network, the umbrella association for the state think tank movement. It links the state groups to training, information, and resources as well as to national policy experts.

Bonding Social Capital: Bonding social capital is generated through horizontal networks and is often characterized by organizations that are relatively equal and share the same or similar values, beliefs, or interests. These bonds are marked by trust, information exchange, and reciprocity and are referred to as strong ties in a social network. (Ashman, Brown and Zwick, 1998) Among state think tanks, bonding social capital often occurs between like-minded organizations when they collaborate on research or marketing.

Bridging Social Capital: Bridging social capital is also generated in horizontal networks, but among heterogeneous groups that may not share the same values or beliefs. There is less trust between the actors, and this is therefore often called a weak tie. (Ashman, Brown and Zwick, 1998) However, these external connections have been described as the difference between “getting by” and “getting ahead” in society. (Putnam, 2000) Free-market state policy groups may create bridging social capital by working with their liberal or progressive counterparts in the states or with non-political groups on issues of mutual interest.

Methodology

Quantitative

Regression analysis was selected as the means to measure the degree of effect between the dependent and independent variables, thereby establishing the latter’s predictive value.

Using SPSS analysis, two linear regressions were performed in order to evaluate the think tanks based on their funding and media growth during the years 2006 to 2008. The regressions measured the significance of each independent variable in relation to the dependent variable of either funding or media.

In the first regression, the dependent variable was the revenue growth between 2006 and 2008. The independent variables were the age of the organization, population, competition, media growth, unemployment growth, and political environment.

In the second regression, the dependent variable was media growth between 2006 and 2008. The independent variables were the age of the organization, population, competition, revenue growth, unemployment growth, and political environment.

Then a model was generated to predict the performance of the think tanks in funding and media growth for the stated years, which could be compared to the actual results of the think tanks' operations in these areas to measure their real performance.

Qualitative

Three think tanks were identified for more in-depth interviews regarding their use of networks based on their level of success compared to the predictive model. The process for this phase was as follows. First, general background information on the organization was compiled based on their Web sites, publications, and media. Second, the data on the independent variables of political setting and funding competition were reviewed to understand the environment in which the think tank operates. Then a telephone interview was conducted with each executive director to cover questions regarding the history of the organization as well as its use of bonding, bridging, and linking social capital. (See Appendix A for the interview questions.) The original data and the interviews were then synthesized and analyzed to develop case studies for each think tank.

CHAPTER 4 PRESENTATION AND ANALYSIS OF DATA

Quantitative Data

Analysis of Revenue Growth

In the first regression analysis, the value of the dependent variable—revenue growth between 2006 and 2008—was estimated by using the independent variables of organizational age; population (as indicated by “Medium State” and “Large State”); competition; economy (determined by the state’s unemployment growth); media growth; and the political environment (as indicated by “Red State” and “Blue State”).

In Table 4.1, the significance of the effect of each independent variable on revenue growth is indicated in the far right column. A statistically significant finding would indicate that the effect of the independent variable is statistically distinguishable from no effect. Researchers commonly use the standard of a 5 percent significance level ($p \leq 0.05$). This means that there is at least a 95 percent statistical probability that the independent variable caused the effect and at most a 5 percent probability that it had no measurable effect. (Muhlhausen, 2010) When one has a small data set—in this case, there are only 39 state think tanks in the study—it is acceptable to use .10 for the p value, which would indicate a 90 percent probability that the independent variable had an effect on the dependent variable.

The results below show that only one independent variable—organizational age—was statistically significant and had a predictive value on growth in revenue. The p value was .008, meaning that there is a 99.2 percent probability that the age had an effect on

revenue. Thus, one can conclude that revenue growth was connected to organizational age and has not occurred by chance.

What may seem surprising, though, is that for each additional year in operation, an organization had a decrease in revenue growth of 8 percent. This is reflected in B, which indicates how the dependent variable changes as the independent variable changes. This may be explained by the fact that state think tanks might receive an infusion of seed money in their formative years and, thus, grow rapidly. After several years of operation, growth may be much less dramatic.

In terms of the other independent variables in the regression, the high degree of unexplained variation—even using the less rigorous *p* value of .10—indicates that there is no meaningful relationship and that they have no predictive value in terms of revenue growth.

Table 4.1: The Correlation of Independent Variables in Relation to Revenue Growth

Model	Coefficients ^a				
	Unstandardized Coefficients		Standardized Coefficients	T	Sig.
	B	Std. Error	Beta		
(Constant)	184.940	92.434		2.001	.055
Organizational Age	-8.021	2.818	-.551	-2.847	.008
Medium-Sized State	-1.582	37.047	-.008	-.043	.966
Large-Sized State	84.253	54.287	.342	1.552	.132
Revenue_2006	-1.253E-5	.000	-.109	-.525	.604
Competition	-3.199	10.258	-.068	-.312	.757
Unemployment Growth (2006–2008)	-.278	.501	-.091	-.555	.583
Media Growth (2006–2008)	.066	.117	.088	.562	.578
Red State	19.532	75.954	.097	.257	.799
Blue State	29.698	75.023	.149	.396	.695

a. Dependent Variable: Revenue Growth 2006–2008

Ranking the Most Effective Think Tanks Based on Revenue

The regression also provided a predictive model for think tank revenue growth based on these variables. Specifically, the regression estimated the percent by which the think tank revenue was expected to change between 2006 and 2008. In roughly half of the cases, revenue was predicted to increase. This model was then compared to the actual revenue growth of the think tanks, and the variance was indicated.

The results, shown in Table 4.2, are sorted in descending order by the percent of variance from model, with the think tanks that exceeded predicted growth by the greatest margin listed first.

On the first line of the table, it was predicted that the Illinois Policy Institute, for example, would experience 234 percent growth based on its age, state population, and other independent variables noted above. Its actual growth, however, was 491 percent, or 256 percent better than the model predicted. The Free State Foundation of Maryland performed 136 percent better.

In total, 19 state think tanks performed better than predicted. In contrast, the Center for Policy Research of New Jersey and the Allegheny Institute for Public Policy—at the end of the list—performed 160 percent and 176 percent worse, respectively, than the model forecasted.

Table 4.2: Ranking of Think Tanks Based on Variance from Predictive Model for Revenue Growth

State Think Tank	Founded	ST	Predicted Growth 2006–2008	Actual Growth 2006–2008	Variance
Illinois Policy Institute	2002	IL	234.20%	490.87%	256.67%
Free State Foundation	2007	MD	173.15	309.43	136.29
Tennessee Center for Policy Research	2005	TN	176.46	259.03	82.58
Virginia Institute for Public Policy	1996	VA	69.89	140.51	70.62
Independence Institute	1985	CO	-9.43	53.25	62.68
Goldwater Institute	1988	AZ	19.13	79.51	60.38
Grassroot Institute of Hawaii	2001	HI	125.83	177.48	51.65
Nevada Policy Research Institute	1991	NV	48.75	91.95	43.20
Cascade Policy Institute	1991	OR	37.13	79.02	41.89
Yankee Institute	1984	CT	-6.60	24.15	30.74
Flint Hills Center for Public Policy	1996	KS	85.32	113.25	27.93
John Locke Foundation	1989	NC	-28.74	-0.96	27.77
Pacific Research Institute	1979	CA	-28.70	-1.14	27.56
Alabama Policy Institute	1989	AL	5.77	27.18	21.41
Show-Me Institute	2005	MO	151.15	166.5	15.35
Center of the American Experiment	1990	MN	30.45	45.08	14.63
Pioneer Institute	1988	MA	13.66	28.29	14.62
Wisconsin Policy Research Institute	1987	WI	13.16	27.77	14.61
Josiah Bartlett Center for Public Policy	1993	NH	85.56	93.97	8.41
Rio Grande Foundation	2000	NM	148.55	147.14	-1.41
Evergreen Freedom Foundation	1991	WA	19.20	15.65	-3.56
South Carolina Policy Council	1986	SC	11.52	3.22	-8.30
Texas Public Policy Foundation	1989	TX	74.46	65.32	-9.14
Maine Heritage Policy Center	2002	ME	133.11	123.08	-10.03
James Madison Institute	1987	FL	39.26	27.78	-11.47
Sutherland Institute	1995	UT	59.81	46.31	-13.50
Commonwealth Foundation	1988	PA	102.98	85.19	-17.79
Mississippi Center for Public Policy	2003	MS	160.46	134.42	-26.04
Oklahoma Council of Public Affairs	1993	OK	49.72	22.16	-27.56
Buckeye Institute	1989	OH	98.30	66.57	-31.73
Georgia Public Policy Foundation	1991	GA	-5.49	-40.65	-35.16
Mackinac Center for Public Policy	1987	MI	73.21	35.14	-38.07
Thomas Jefferson Institute	1996	VA	71.01	23.07	-47.94
Maryland Public Policy Institute	2001	MD	155.79	67.62	-88.17
Arkansas Policy Foundation	1995	AR	88.43	-11.66	-100.09
Bluegrass Institute	2004	KY	155.94	54.97	-100.97
Washington Policy Center	1997	WA	88.16	-13.45	-101.62
Center for Policy Research of New Jersey	2002	NJ	141.72	-18.68	-160.40
Allegheny Institute for Public Policy	1995	PA	161.14	-14.89	-176.02

Analysis of Media Growth

In the second regression, media growth between 2006 and 2008 was used as the dependent variable. The independent variables were organizational age; population (as indicated by “Medium State” and “Large State”); competition; unemployment growth; revenue; and the political environment (as indicated by “Red State” and “Blue State”).

The results, shown in Table 4.3, show that few independent variables had any impact on media exposure, as the *p* values in the right-hand column were generally greater than 10 percent. The exception was the political environment, as indicated by “Red State” and “Blue State.” The regression shows that a red state (one in which Republican candidates carried three to four of the last four presidential elections) or a blue state (one in which Democrats carried the state) had approximately 97 percent statistical probability to have an effect on media exposure, but only as compared to purple states (where each political party carried two of the four presidential elections). Compared to think tanks in purple states, think tanks in red and blue states experienced declines of 256 and 255 media citations, respectively, from 2006 to 2008. A possible explanation may be that there is greater public discourse through the media think tanks in states where political races are highly competitive.

Table 4.3: The Correlation of Independent Variables in Relation to Media Growth

Model	Coefficients ^a				
	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
(Constant)	355.177	156.486		2.270	.031
Organizational Age	-2.300	5.094	-.118	-.451	.655
Medium-Sized State	38.968	63.588	.142	.613	.545
Large-Sized State	-75.247	85.757	-.228	-.877	.387
Revenue_2006	2.065E-5	.000	.135	.548	.588
Competition	-.908	16.363	-.014	-.056	.956
Unemployment Growth (2006–2008)	-.621	.788	-.152	-.789	.437
Red State	-256.185	110.800	-.953	-2.312	.028
Blue State	-255.079	109.482	-.957	-2.330	.027
Revenue Growth (2006–2008)	.026	.751	.008	.034	.973

a. Dependent Variable: Media Growth 2006–2008

Ranking the Most Effective Think Tanks Based on Media

A second predictive model was generated to show the expected performance of think tanks in terms of media growth between the years 2006 and 2008. (See Table 4.4.) As with the revenue model, the predictions were compared to the actual performance by the think tank, and the variance was indicated in ranking order with the groups that exceeded predicted growth by the greatest margin listed first.

As might be expected, three think tanks that ranked in the top ten of the revenue model (the Tennessee Center for Policy Research, the Goldwater Institute in Arizona, and the Nevada Policy Research Institute) also appeared in the top ten in the media model. Two other top revenue producers (the Illinois Policy Institute and the Independence Institute) also performed better than the media growth model had predicted.

Table 4.4: Ranking of Think Tanks Based on Variance from Predictive Model for Media Growth

State Think Tank	Founded	ST	Predicted Growth 2006–2008	Actual Growth 2006–2008	Variance
Maryland Public Policy Institute	2001	MD	92.96	466.67	373.71
Nevada Policy Research Institute	1991	NV	261.96	553.85	291.88
Tennessee Center for Policy Research	2005	TN	91.53	324	232.47
South Carolina Policy Council	1986	SC	39.23	205	165.77
Goldwater Institute	1988	AZ	102.14	264.29	162.15
Rio Grande Foundation	2000	NM	66.92	215.38	148.47
Pacific Research Institute	1979	CA	-33.09	94.83	127.92
Texas Public Policy Foundation	1989	TX	-9.34	53.47	62.81
Allegheny Institute for Public Policy	1995	PA	-29.71	10.13	39.84
Commonwealth Foundation	1988	PA	-44.08	-11.07	33.02
Illinois Policy Institute	2002	IL	2.30	29.41	27.11
Josiah Bartlett Center for Public Policy	1993	NH	49.36	72.73	23.37
Washington Policy Center	1997	WA	110.54	129.21	18.67
Independence Institute	1985	CO	37.67	50.18	12.52
Mackinac Center for Public Policy	1987	MI	-0.42	0.77	1.19
Flint Hills Center for Public Policy	1996	KS	42.35	40.98	-1.37
Georgia Public Policy Foundation	1991	GA	3.10	-2.37	-5.47
Center for Policy Research of New Jersey	2002	NJ	83.59	68.75	-14.84
Cascade Policy Institute	1991	OR	27.97	6	-21.97
Yankee Institute	1984	CT	9.18	-21.1	-30.28
Arkansas Policy Foundation	1995	AR	52.82	17.65	-35.18
Bluegrass Institute	2004	KY	78.28	42.86	-35.43
Alabama Policy Institute	1989	AL	17.23	-25	-42.23
Thomas Jefferson Institute	1996	VA	60.56	17.86	-42.70
Show-Me Institute	2005	MO	112.61	56.72	-55.90
John Locke Foundation	1989	NC	108.39	39.67	-68.72
Center of the American Experiment	1990	MN	65.92	-2.94	-68.86
Mississippi Center for Public Policy	2003	MS	91.63	12.5	-79.13
Virginia Institute for Public Policy	1996	VA	58.72	-23.53	-82.25
Grassroot Institute of Hawaii	2001	HI	37.29	-49.58	-86.87
Wisconsin Policy Research Institute	1987	WI	82.20	-5.94	-88.14
Pioneer Institute	1988	MA	86.27	-3.36	-89.63
Oklahoma Council of Public Affairs	1993	OK	69.56	-24.04	-93.60
Sutherland Institute	1995	UT	41.08	-52.67	-93.75
Free State Foundation	2007	MD	106.07	-11.11	-117.18

Maine Heritage Policy Center	2002	ME	65.39	-56.8	-122.19
James Madison Institute	1987	FL	152.83	12.5	-140.33
Buckeye Institute for Public Policy Solutions	1989	OH	219.73	68.18	-151.55
Evergreen Freedom Foundation	1991	WA	114.21	-39.11	-153.32

However, there are some surprises. The Maryland Public Policy Institute ranked first for exceeding predictions of media growth by over 373 percent but was simultaneously one of the lower performers in revenue growth for the same period (see Table 4.2), having raised 88 percent less than the regression foretold. Meanwhile, another Maryland institution, the Free State Foundation, greatly underperformed in media (117 percent worse than the model predicted) but had been ranked second in revenue growth. Likewise, the Allegheny Institute for Public Policy of Pennsylvania was last in revenue performance (-176 percent) but ranked ninth in media growth. Finally, the Evergreen Freedom Foundation of Washington was positioned last in media growth, having performed 153 percent worse than predicted, but had returned solid results in revenue growth.

It might be expected that groups that have been successful in raising funds would also be successful in securing media attention. The predictive model bore this out in many instances. This may be because the top revenue-generating groups have the capacity to produce more products, can afford to hire additional staff to work with the media, or have sufficient funds to hire public relations consultants.

Yet that does not explain why some poor revenue producers were able to greatly exceed expectations in garnering media or when groups that ranked at the top in the revenue model performed poorly in the media model. There may be several reasons for these seeming inconsistencies. One explanation may be that the low-performing revenue

producers, such as the Allegheny Institute for Public Policy, may divert a larger percentage of their operational funds to generating media. Meanwhile, the fact that some think tanks performed well on the revenue side but poorly in the media may be the result of other factors, such as their use of online media or other communication vehicles, which were not measured in the media data. Finally, state politics could impact the media results of think tanks. A state with a more contentious political environment may generate more opportunities for public debate. A fuller picture will be sought through the case studies.

Qualitative Data

Three think tanks were selected for in-depth interviews with current and past executive directors regarding their use of networks based on their level of revenue and media efficiency as demonstrated in Tables 4.2 and 4.4. (See Appendix A and Appendix B for interview questions and details about the organizations.) Chapters 5–7 are the case studies that resulted from the interviews. In each case, the independent variables of the state’s economy, the political environment, and competition were considered, as well as new factors such as the influence of the board and the background, experience, and special skills of the executive director. The goal was to ascertain whether the use of nonprofit networks to forge linking, bonding, and bridging social capital played a significant role in an organization’s success or failure or whether other variables were more relevant.

The three think tanks and the reasons they were selected are as follows:

- **Case Study 1: Illinois Policy Institute.** Founded less than a decade ago, the Illinois Policy Institute has grown at a rate that has far outpaced its counterparts in

other states. Its success seems to correlate to the advent of new institutional leadership, but there may be other factors at work as well.

- **Case Study 2: Evergreen Freedom Foundation.** A seasoned think tank formed in 1991, the Evergreen Freedom Foundation performed very close to what the model predicted in terms of revenue. However, it was ranked last in expected media growth. Based in Washington State, it must contend with several competitors including another free-market state think tank, the Washington Policy Center.
- **Case Study 3: Center for Policy Research of New Jersey.** This think tank was founded in 2002, the same year as the Illinois Policy Institute, but has had markedly worse results in both funding and media growth. By 2009, it had ceased operations.

CHAPTER 5
CASE STUDY #1: ILLINOIS POLICY INSTITUTE

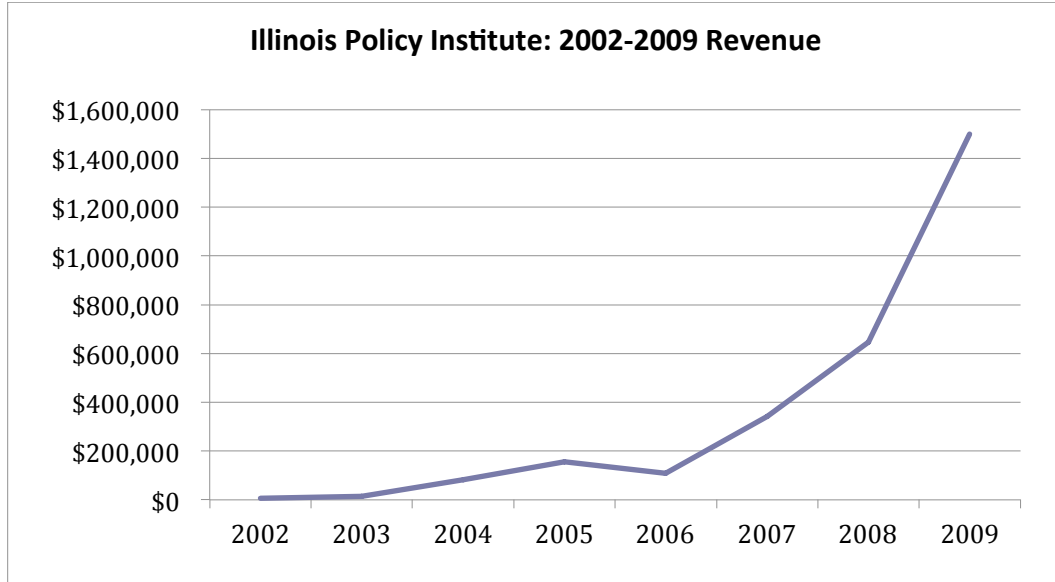
Introduction

“Network with purpose; network with sincerity.” That is the guiding principle that drives Chief Executive Officer and Chairman John Tillman and his staff of 14 at the Illinois Policy Institute (IPI).

John Tillman joined the Institute as a board member in 2007 and shortly thereafter became chief executive officer and chairman. Since then, the Institute has grown dramatically, placing it 256 percent ahead of the projections from the regression analysis. (See Chart 5.1.)

While Tillman’s business background and the State of Illinois’ politics—rocked by mismanagement and scandals involving the Democratic governor—may have contributed to the Illinois Policy Institute’s success, there is also evidence of deliberate and strategic engagement in nonprofit networks. Moreover, this involvement pre-dated Tillman’s tenure as CEO.

Chart 5.1: Illinois Policy Institute's Revenue Growth



History

The Illinois Policy Institute (www.illinoispolicy.org) describes itself as “a nonpartisan research organization dedicated to supporting free market principles and liberty-based public policy initiatives for a better Illinois. As a leading voice for economic liberty and government accountability, we engage policy makers, opinion leaders, and citizens on the state and local level.”

The Institute eschews ideological labels of conservative or libertarian because it feels that these can be inaccurate, but its work is based on the principles of economic liberty and free-market principles that are often synonymous with a conservative policy agenda. Its five priority issue areas are budget and taxes, education, government reform and transparency, health care, and transportation.

Founded in 2002 by Gregory Blankenship, the Institute took four years to get to the \$100,000 mark in annual revenue. During this time, the board of directors of the

Illinois Policy Institute remained at three members, which included the founder. Blankenship was born in Illinois but spent a period of his professional career in Washington, D.C. He was a member of the staff at the Washington-based Center for Security Policy and later worked in the corporate public affairs arena in the telecommunications industry. His background in policy and public affairs made him arguably better connected to the national policy world than to the state environment.

After the terrorist attacks of September 11, 2001, Blankenship read about State Policy Network in a *Wall Street Journal* editorial and decided to call SPN's president, Tracie Sharp. Blankenship was unaware of the state think tank movement but interested in forming an organization in Illinois. Sharp took his call but directed him to Joseph Bast, the founder, president, and CEO of the Heartland Institute, a conservative public policy organization in Chicago with more than two decades of success in promoting national policy change. According to Blankenship, Bast told him that it takes approximately five years for a think tank to gain recognition, credibility, and a base of donors. The quantitative research in this study generally affirms this supposition. Simply put, a think tank's age has an impact on its revenue.

Blankenship based his operations in Illinois' capital, Springfield, in order to begin building relationships with Illinois lawmakers, lobbyists, and trade associations. He prided himself on being able to work as well in the idea-realm of public policy as he did in the reality of partisan politics. He was also a prolific writer and would regularly produce three to four commentary pieces a week, often to the detriment of fundraising activities. The Institute relied heavily on State Policy Network grants for operating support. "They basically saved us," says Blankenship. Due to the high investment costs,

IPI was unsuccessful in sustaining a direct mail program to attract individual donors. Meanwhile, Blankenship was finding that the SPN grant process had become more competitive due to the increasing number of state think tanks and their growing sophistication in fundraising techniques.

By 2006, the Institute was struggling financially, experiencing a 30 percent drop in revenue from 2005.

While Blankenship was trying to establish IPI as the go-to source for free-market policy, Illinois entrepreneur and businessman John Tillman was looking for something new. A 25-year resident of the state, Tillman had started more than half a dozen businesses in the areas of retailing, e-commerce, and Internet access, but he turned his attention to public policy in 2004. He says, “I didn’t know anyone in the policy community.” So he applied his marketing acumen from the business world and began making telephone calls to national and state organizations involved in free-market policy and politics. This led him to the Virginia-based grassroots group, Americans for Limited Government, where he became president and director in May 2004. Over the course of two years, he helped ALG grow from a single, part-time employee to a staff of approximately 25 that had a significant impact on political activity in 13 states in 2006. Through ALG, Tillman became more aware of state policy, and in 2007, he approached the Illinois Policy Institute to join its board.

Tillman brought a different approach to the organization. As Blankenship noted, Tillman was “Chicago-centric,” meaning he was connected to the business world of Chicago. Tillman also considered it essential to be engaged in Chicago’s media market, which is the third largest in the country. So while Blankenship remained in the state’s

capital, Tillman reestablished IPI's headquarters in Chicago. Blankenship acknowledges today that having both locations was important for success in a state like Illinois. Think tank executives need to communicate as effectively with lawmakers as they do with media and potential major donors.

Blankenship's departure from IPI in 2008 allowed Tillman to take the helm. Within 12 months, revenue skyrocketed to \$1.5 million. Moreover, more than 65 percent of IPI's revenue in 2009 came from residents of Illinois, an indicator of Tillman's success in connecting to influential and wealthy individuals in the state. The balance of IPI's funds came from private foundations and corporations.

Internal Factors

Board of Directors

Since 2008, the board has been augmented with two new members who serve on other nonprofit boards. Before 2008, the board was made up of three members who did not offer significant connections to the outside community.

Leadership

Blankenship and Tillman's dissimilar professional backgrounds resulted in very different approaches to running a think tank. Blankenship describes himself as being "service-oriented." He relished his role in helping other organizations and developing policy ideas. Tillman, meanwhile, believes that message and marketing have been crucial to the Institute's success. Like many other business executives, Tillman speaks in terms of unique selling proposition, markets, and measurable results. His methods are akin to the practices of any successful for-profit entity in that he works to understand and respond to the needs of his customers—who are lawmakers. In a practical sense, this

means providing lawmakers with policy ideas while understanding the political repercussions of those ideas.

External Factors

State Economy

Between 2006 and 2008, Illinois' unemployment rate increased from 4.1 percent to 7.6 percent. This was one of the largest increases among the states studied and larger than Washington or New Jersey, the locations of the think tanks in the other case studies. With nearly 13 million residents in 2008, Illinois is also the largest state among the three states studied.

Political Environment

The Illinois General Assembly has shifted between Republican and Democratic control over the years, while the governorship was firmly in the hands of Republicans from 1977 to 2003. At that time, the last Republican occupant retired, and Rod Blagojevich became the first Democrat in a quarter of a century to be elected governor. Five years later, he achieved another first as the first Illinois governor to be impeached and removed from office after being charged with conspiracy and solicitation to commit bribery. (Weisberg, 2008)

For the years of this study, 2006–2008, the political environment created both opportunities and challenges for the Institute. On one hand, there was growing discontent with Governor Blagojevich's spending policies, which provided an opening for new policy solutions by an aggressive think tank that espoused better fiscal policies. On the other hand, Democrats controlled both chambers of the Illinois General Assembly, which

meant that conservative policy victories would be difficult to achieve. Table 5.1 shows the composition of the General Assembly for the years 2006–2008.

Table 5.1: Composition of Illinois General Assembly by Political Party Affiliation for Years 2006–2008

	House of Representatives			Senate		
	D	R	Other	D	R	Other
2006	65	53		31	27	1
2007	66	52		37	22	
2008	67	51		37	22	

Competition

As noted, Illinois is home to one of the more successful national think tanks, the Heartland Institute (www.heartland.org). According to its annual report, Heartland’s key audiences are the nation’s 8,300 state and national elected officials and approximately 8,400 local elected officials. Founded in 1984, it now raises close to \$8 million annually to fund its research on such issues as education, health care, the environment, and property rights. Yet individuals account for only 7 percent of Heartland’s revenue. The majority of its funding (76 percent) comes from private foundations.

By contrast, another national organization, the Heritage Foundation, has found Illinois to be a target-rich environment for individual donors. In 2009, 3.6 percent (or \$2,365,200) of its \$65.7 million annual revenue came from Illinois members. Further, it has established an active local group—the Chicago Community Committee—to engage local Heritage donors and raise funds.

These two organizations present both an opportunity and a threat to the Illinois Policy Institute. Heritage’s fundraising achievements indicate a capacity and willingness among individuals to donate to free-market causes, which may also benefit IPI if it is able to solicit these people for funds. Additionally, Tillman’s strong links to the Heritage

Foundation give him access to its information and experts. Meanwhile, Heartland is a recognizable brand in Illinois and connected to the state even though its focus is national. IPI's affiliation with this institution may offer it a measure of credibility among lawmakers and the media.

On the other hand, the existence of these two policy groups meant that the Illinois Policy Institute was operating in a busy field and had to work hard to distinguish itself and its products. Further, it made it challenging for IPI to gain a foothold in the media, as journalists may be more apt to cover Heartland's activities and seek out its experts for comments.

Illinois is also home to several smaller 501(c)(3) nonprofit organizations that, like IPI, broadly defend the principles of a free society including free enterprise and rule of law. These include the Illinois Taxpayer Education Foundation; the New Coalition for Economic and Social Change; the Howard Center for Family, Religion and Society; and the Rockford Institute. The annual revenues of these groups range from \$60,000 to over \$4 million, and they share a long tenure in Illinois. Rockford was established in 1982, and the other groups were formed in the early 1990s.

Nonprofit Networks

Both leaders of the Illinois Policy Institute tapped into vertical and horizontal networks that resulted in various levels of linking, bonding, and bridging social capital.

Linking Social Capital

Blankenship and Tillman spoke in glowing terms about State Policy Network and have attended "almost everything" that SPN hosts, from its large annual meeting to the series of training workshops held throughout the year. Tillman has been a speaker at

these meetings and has had as many as nine staff members in attendance. They regard SPN events as integral to forging ties with other think tank leaders, connecting them to the larger conservative movement, and offering valuable tools for developing fundraising and public relations skills. The agenda for the 2008 State Policy Network Annual Meeting shows that nearly 60 percent of the sessions during the two-day meeting were devoted to either fundraising or media. (See Appendix C.) Likewise, both attended the Heritage Foundation’s Resource Bank meeting, another annual gathering of the conservative policy community. The program for this meeting is more extensive, but the 2008 agenda indicates that 35 percent of the sessions covered fundraising topics. (See Appendix D.)

The networks of state think tanks help develop the strong bonds and cohesion that support the “message machine” of the conservative movement. (Bai, 2007) Blankenship excelled in forging and utilizing these connections. His experience in Washington and working in corporate public affairs allowed him to form a relationship with Americans for Tax Reform, a taxpayer advocacy group that is known for its “Wednesday” meeting, a gathering of more than 150 policymakers, grassroots activists, and policy experts at its Washington, D.C., headquarters that has been held weekly since 1993. In addition, similar meetings take place regularly in 47 states, where “center-right” groups meet to network, strategize, and promote their ideas. ATR’s network of like-minded groups introduced Blankenship to national and state leaders who advanced the same issues.

Blankenship was also instrumental in giving national conservative groups entrée into the state. He would work with allied organizations such as the Heritage Foundation and the National Taxpayers Union—a taxpayer advocacy group in Alexandria,

Virginia—to host local events. This activity, while extremely time-consuming for IPI’s leader, generated goodwill and sometimes a small grant. It also had other practical results. Blankenship cites one example where they successfully opposed a state tax increase by leveraging the connections and expertise of various state and national policy groups. Overall, the collaboration with center-right groups complemented and expanded IPI’s influence.

Through its interaction with larger networks, IPI built linking social capital that gave it access to resources, training, ideas, and information. Tillman stated that he was able to meet with philanthropists and corporate donors who attended these meetings and that this resulted eventually in gifts for his Institute. Additionally, he and his staff acquired new skills that improved IPI’s fundraising and media programs and produced more funds and media attention. Finally, both Tillman and Blankenship built social ties with a network of colleagues who could provide guidance and support for the Institute’s efforts.

Bonding Social Capital

Greg Blankenship approached the Heartland Institute regularly for ideas and opportunities to collaborate. Despite his outreach to this Chicago-based group, he did not feel that Illinois had a strong grassroots infrastructure for engaging multiple groups and individuals. His goal was to make the Illinois Policy Institute a hub for like-minded groups in the state and on a national level. Blankenship’s Washington-focus resulted in less evidence of bonding social capital during his tenure.

John Tillman relied on 20–25 meetings and events per month to extend his networks, of which approximately a third are with other nonprofit organizations. Like

Blankenship, many of these are national groups that are not equal to the Institute in terms of their size and access to influence and resources. On a typical day, Tillman met with Matt Kibbe, CEO of the grassroots organization FreedomWorks, and then welcomed Arthur Brooks, president of the American Enterprise Institute in Washington, D.C., to give the keynote address for an IPI meeting in Chicago.

The Illinois Policy Institute's willingness to share its knowledge was one area where bonding social capital was most apparent. Like the CEOs in Crutchfield and Grant's high-impact nonprofits, Tillman built informal networks with his contemporaries at other state think tank, primarily through State Policy Network events. In addition, he convened a marketing exchange conference call to share his marketing expertise with the executive directors of other conservative nonprofit organizations.

Bridging Social Capital

Blankenship took pride in his connections to politically conservative people and organizations in virtually all of the states. He maintains these bonds to this day by attending conferences and posting on blogs and message boards of conservative policy groups. However, he was less successful in creating new relationships with people or institutions that were external to his network.

Tillman, on the other hand, did not limit his outreach to free-market allies. He has leveraged horizontal networks to forge ties with at least two other Illinois institutions, the Civic Committee of the Commercial Club of Chicago and the Civic Federation. The former, according to its Web site, "is one of the oldest organizations representing the business, professional, educational and cultural leaders of the Chicago region dedicated to improving Chicago as a place to live, work and conduct business." The latter provides

fiscal policy analysis and recommendations to state officials, the media, and the public. These groups are not connected with the free-market movement, although they espouse some policies that would align with fiscally conservative views.

Tillman is also connected to heterogeneous groups and the community through the nonprofit boards on which he serves, including one for his church. He is also a member of the North Center Chamber of Commerce and volunteers as village president in his community. Previously, his board experience included the Boys and Girls Club.

Tillman's bridging social capital activities are deliberate. In order to access people beyond his immediate sphere of contacts—or, as he calls it, the “persuadable middle”—he has developed “weak ties” by identifying and cultivating a list of policy influencers. The Institute may not be ideologically aligned with these individuals or organizations, but Tillman and his team sought them out and partnered with them whenever possible to advance their free-market policy agenda.

Reflecting on his tenure as president, Blankenship said his original goal was to create an institution that would exist beyond him, and he achieved that. He was pleased with the organization's accelerated growth starting in 2007 and referred to his initial conversation with Heartland President Joe Bast about the need for an organization to reach the five-year mark to prove that it has staying power. The early years are critical for establishing credibility, building networks, and demonstrating consistency in order to gain the trust of the media, policymakers, and donors.

CHAPTER 6
CASE STUDY #2: EVERGREEN FREEDOM FOUNDATION

Introduction

“Hollywood is an important market for us,” says Lynn Harsh, executive director of the Evergreen Freedom Foundation (EFF) in Olympia, Washington. This is not a statement one might expect from the leader of a free-market think tank. After all, it is much more common to hear of the entertainment industry lining up behind left-wing causes rather than more conservative ones.

But the Evergreen Freedom Foundation does not always follow the more traditional pathways to success that are followed by other free-market policy groups. That may be because of its location in liberal-leaning Washington State. Like so many other think tanks, it generates research and policy recommendations, but it has to be more innovative in order to get its message across. In 2008, for instance, it produced *Flunked*, a documentary on the failing education system narrated by award-winning Hollywood actor Joe Mantegna. The film later won the award for Best Documentary at the San Fernando Valley International Film Festival in Los Angeles.

The Evergreen Freedom Foundation was selected for a case study because it is a seasoned group whose financial performance was in line with the regression model. The model forecasted 19.2 percent revenue growth between 2006 and 2008, and EFF achieved 15.6 percent. However, in terms of media penetration, Evergreen was the worst-performing state think tank. The model predicted 114 percent growth in media placements, and EFF’s media declined by 39 percent, according to the data collected.

Nonetheless, as one of the oldest and best-established free-market state think tanks, the Evergreen Freedom Foundation offers a model for fledging groups in its systematic approach to utilizing its nonprofit networks.

History

In 1991, the state think tank world was still relatively small. There were only 15 other free-market organizations operating in various states, though three others would be formed that year along with EFF. Their only source of organizational support was the Madison Group, a loose confederation of groups that was the precursor to State Policy Network.

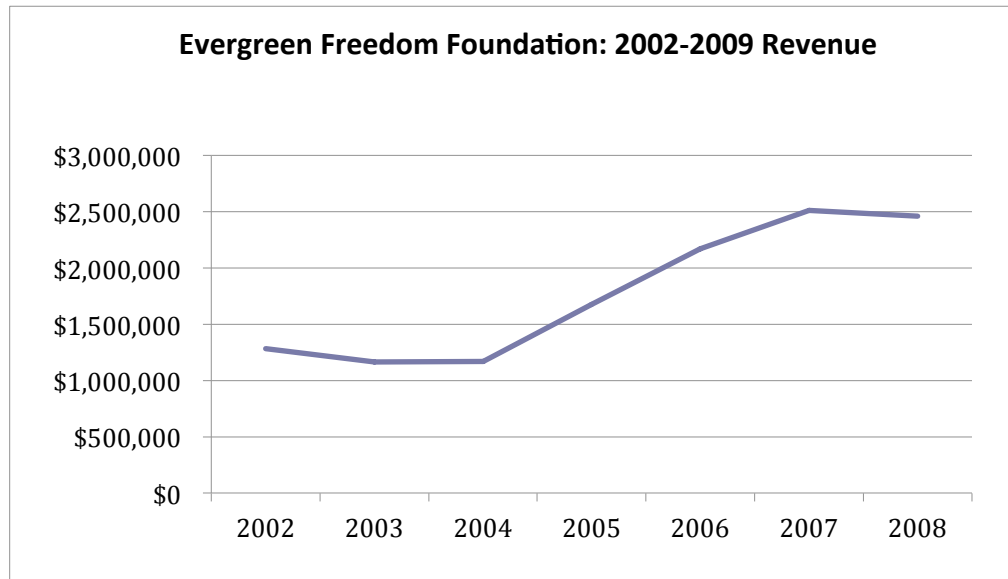
Unlike today's new state think tanks that can count on training, legal, financial, and fundraising advice (and often seed money) from SPN, the Evergreen Freedom Foundation was established from scratch with a couple of hundred local contacts of the two founders, Lynn Harsh and Bob Williams.

Nineteen years later, EFF is a \$2.5 million organization (see Chart 6.1) with 23 employees, five contractors, 20 high-level volunteers, and 5,000 individual donors. Its primary research areas are economic policy, education reform, elections, labor policy, and property rights, analyzed from a perspective that promotes individual liberty, free enterprise, and accountable government. It reports that more than 50 percent of its revenue comes from individuals. Significantly, it is still led by one of the founders, Lynn Harsh. The other founder, Bob Williams, also remains actively involved with the organization as a senior fellow.

While primarily a policy group, EFF engages in legal analysis and litigation—an area in which few think tanks participate. EFF focuses on those legal areas that are

consistent with its core mission: government accountability, labor policy, education policy, and economic policy.

Chart 6.1: Evergreen Freedom Foundation's Revenue Growth



Internal Factors

Board of Directors

At 17 members, the Evergreen Freedom Foundation's board is larger than those of most other state think tanks. Evergreen makes good use of board committees to carry out its governance duties. All of the members serving in 2008 have been serving from at least 2006. Moreover, most serve on the boards of other nonprofit organizations ranging from their churches to Habitat for Humanity.

According to Harsh, the organization has learned over time how to identify the right type of individuals to serve on its board. It looks for leaders who have connections—or networks—in the larger community. Successful entrepreneurs are best.

It is critical that board members can think at the executive level and be very engaged in fundraising.

Leadership

Chief Executive Officer Lynn Harsh was one of the founders of the Evergreen Freedom Foundation. Born in Oregon, she spent most of her adult life in Washington State. Before forming the group in 1991 with Bob Williams, she taught high school English and history and dabbled in local politics. Harsh did not serve on any nonprofit boards but was an advisor to several.

Williams brought in-depth policy and political expertise to EFF. He worked for the U.S. Government Accountability Office, auditing the Pentagon and Post Office before moving to Washington State, where he served five terms in the legislature and was the 1988 Republican nominee for governor.

While some nonprofits can suffer from a “founder’s” syndrome whereby the original creator of an organization becomes ineffective but remains at the helm, EFF seemed to have navigated its course well. EFF remained innovative and agile despite its long history and large size. There was a seamless transfer of responsibility from Williams, who was the initial executive officer, to Harsh, who took the role in the late 1990s.

External Factors

State Economy

Washington falls into the category of a medium-sized state for this study because its 2008 population was 8,682,661, or between the 5 million and 10 million that designated the medium states.

Of the three states represented in the case studies, Washington fared better economically based on its unemployment rate. Unemployment increased 42 percent between 2006 and 2008, but this was much less than in Illinois (85 percent increase in unemployment rate) and New Jersey (69 percent). There are many other ways to evaluate state economies. A report sponsored by the Ewing Marion Kauffman Foundation and produced by the Information Technology and Innovation Foundation ranks states by their ability to operate in a new economy that requires global outreach and an educated workforce. Significantly, Washington State ranked fourth in the nation in 2007 and second in 2008. (Andes and Atkinson, 2008)

Political Environment

Washington, like the two other states selected for case studies, is a “blue” state. That is, Democrats carried the state in three of the four last presidential elections. More relevant for this study, Democrats control the state legislature’s Senate and House of Representatives, and their domination is increasing. (See Table 6.1.) The governor since 2004, Christine Gregoire, is also a Democrat. As with Illinois, this political environment may pose both an opportunity and a challenge for EFF fundraisers and media experts. It can be an advantage if supporters feel hopeful that the group can effect change in public policies. It can be a detriment if residents give primarily to political campaigns or feel as though change will not occur despite the work of EFF and others. Likewise in the media, state politics may either encourage or discourage debate and either expand or limit the opportunities available for EFF to deliver its message through the press.

Table 6.1: Composition of Washington State Legislature by Political Party Affiliation for Years 2006–2008

	House of Representatives		Senate	
	D	R	D	R
2006	55	43	26	23
2007	62	36	32	17
2008	63	35	32	17

Competition

EFF has at least two main competitors in the state: the Washington Policy Center (WPC) and the Discovery Institute. The Washington Policy Center (www.washingtonpolicy.org) is also a member of the State Policy Network and raises \$1.5 million annually. Founded in 1997, its mission is quite similar to EFF’s in that it is a research and education institution that focuses on policymakers, the media, and the general public. Its base of operations can be found an hour north in Seattle, but some of its 13 staff members work in its satellite office in Olympia where EFF is located.

The Discovery Institute (www.discovery.org) in Seattle takes a broader policy perspective and consequently has a larger base of support with \$5 million in annual revenue. This group is similar to EFF in that it also promotes the principles of free enterprise and individual liberty, though it does so primarily at the national level. It, too, produces reports, meets with lawmakers, and seeks media attention.

Two other Washington State–based nonprofits are worth noting because of their longevity in the political arena and potential links to EFF. The first is the Second Amendment Foundation, which advocates at the state and national levels for the right to bear arms. This organization was founded in 1974 and raised \$3.5 million in 2008. The second, much smaller group is the Washington Research Council, which researches

public policy issues and conducts economic analysis. Its history dates back to 1932 when it was founded as the Washington Bureau of Governmental Research. In 1954, it merged with the Washington State Taxpayer Association to form the Research Council. In 2008, the group generated less than \$400,000 in revenue.

In short, Washington State has a deep and active history of state policy institutions that advance a free-market economy and a limited scope for government.

Another form of competition is from national organizations. The Heritage Foundation, for instance, receives 2.1 percent (or \$1,379,700) of its annual revenue from individuals in Washington State. By comparing EFF's revenue alone to that of two other state think tanks founded in 1991—the Georgia Public Policy Foundation and the Cascade Policy Institute of Oregon—EFF does not appear to have suffered financially from the fundraising activities of its various rivals. The Evergreen Freedom Foundation is more than double the size of the Georgia Public Policy Foundation and the Cascade Policy Institute, both of which face a similar level of competition. The presence of a large, engaged group of donors in Washington State who understand and value the work of think tanks may be an advantage to EFF in raising funds. This comparison to other think tanks formed in the same year is significant because the regression analysis showed that organizational age was statistically significant and had a predictive value in terms of growth in revenue.

Media Penetration

The regression analysis showed a steep decline in growth in traditional media based on the institute's age and other factors. However, Lynn Harsh stated that EFF's

media placements had increased. Two possible explanations exist for the discrepancy between the collected data and EFF's reported results.

First, the data source utilized to capture media information was NewsBank, which tallies the results from 2,000 local, regional, and national newspapers. While this source proved to be generally accurate for several think tanks examined, it does not capture all of the nontraditional media vehicles such as online sources, which were a major part of EFF's strategy in trying to reach new audiences. The 48,000 unique visitors annually to its "Liberty Live Blog," for example, rivaled that of a major Washington newspaper, *The Seattle Times*. Evergreen also utilized its Web site, podcasts, television, and, more recently, a nationally syndicated radio show, "Radio Free Washington," to secure greater visibility for its work.

A second factor may have been the demise of state and local newspapers in recent years, as well as the reduction in the number of reporters covering state policy. In 2007 and 2008, *The Seattle Times* slashed its budget, closed news bureaus, and laid off dozens of reporters. (Pryne, 2008) In 2009, the *Seattle Post-Intelligencer* ceased publishing a print edition to become a Web-only publication following several years of declining circulation and advertising revenue. With fewer reporters and smaller budgets, newspapers may not have had the same capacity to report on the activity of think tanks that they once had.

Whether or not its media penetration among traditional sources declined, EFF has redeployed its resources to utilize online delivery systems in response to the changing dynamic in the Washington media world and the needs of its identified audiences.

Nonprofit Networks

Harsh believed that nonprofits needed to be more results-driven and think more like for-profits when it came to outcomes and goals. This philosophy carried over to the group's networking activities. Like its public policy work, networking was aimed at an outcome. This meant building connections with many different types of organizations that have shared objectives to create bonding social capital.

The staff at the Evergreen Freedom Foundation took its outreach role seriously. The organization's strategic plan incorporated external networking objectives. Further, all staff members had professional development plans that include a requirement for building networks, measured by the number of contacts and meetings they have with outside organizations. These interactions ranged from telephone calls with like-minded groups throughout the free-market network to face-to-face meetings with potential policy partners within the state.

Linking Social Capital

After nearly two decades of experience and success, the Evergreen Freedom Foundation still finds value in leveraging its vertical connections with the larger conservative movement. Lynn Harsh was a regular attendee at State Policy Network meetings and had been a featured speaker at numerous sessions. She and her staff also attended the annual Resource Bank meeting hosted by the Heritage Foundation in order to meet other policy and fundraising professionals within the think tank world. This engagement in building linking social capital was advantageous to EFF because its experts could learn best practices in nonprofit management, tap into new funding sources

by meeting donors in attendance, adopt winning strategies for advancing public policies through the media, and identify groups for future collaboration on key issues.

Bonding Social Capital

EFF might legitimately consider the Washington Policy Center a rival for funding and visibility, but Harsh called them “colleagues” who are very valuable to EFF’s vision for the state. WPC’s significance stems from its appeal to distinct audiences in Washington that have little overlap with those of EFF. As Harsh explained it, the Washington Policy Center operates more like a think tank in the mold of the American Enterprise Institute. It produces nonpartisan, intellectual policy studies and seeks traditional audiences among business leaders, lawmakers, and the policy elites. In contrast, EFF reaches a far wider, grassroots audience that tends to be more ideologically and activist-oriented. For instance, 1,100 people attended WPC’s annual dinner in 2009 to hear from keynote speaker Ben Stein, the economist and sometime movie actor. That same year, EFF hosted an event that featured television host Glenn Beck and drew 5,900 attendees. Despite their differences, the ability of both the Evergreen Freedom Foundation and the Washington Policy Center to attract numerous supporters is an advantage to EFF because it means that more people are debating conservative, free-market policies, and this advances its agenda as a whole.

EFF also builds its networks through meetings, events, and training seminars with other nonprofit organizations. These interactions are deliberate and strategic, according to the executive director. “We don’t network with everyone,” said Harsh. Harsh and her team held several dozen meetings with other nonprofit organizations throughout the course of a year. They have co-sponsored major rallies with the Washington State chapter

of Americans for Prosperity, a grassroots organization that shares EFF's conservative ideas. In 2007, EFF established CAN (Citizen Action Network) with more than two dozen other organizations to educate and activate thousands of residents in the state. The groups range from political parties to college clubs to policy organizations that are not necessarily part of the conservative cause. The only requisite for participation is that the group promotes the principles of freedom and free enterprise. EFF has planned Legislative Training Days with these groups to tutor citizens about how to become engaged in changing policy.

Harsh does not object to Evergreen's taking the lead role in many of these activities, but she insisted that EFF could not be the only group represented. Rather, it is critical that it builds a wider consensus to achieve policy change.

Additionally, according to Harsh, the public events in particular have been valuable in attracting media attention and increasing the Evergreen Freedom Foundation's visibility in the state. As noted earlier, EFF receives a large proportion of its media attention from online sources.

Bridging Social Capital

Overall, there was less evidence of EFF building networks through bridging to heterogeneous groups, although it has worked with the local Chamber of Commerce and associations representing realtors and farm bureaus on issues of shared interest.

The one area where EFF has made the greatest inroads with nontraditional audiences is related to its work on education reform. EFF has found new allies in Hollywood through the promotion and distribution of its documentary, *Flunked*. The film has opened doors to collaborative opportunities because the need for education reform is

an issue upon which many liberal and conservative groups can agree even if their solutions differ. EFF also used the video to interest new donors, raise funds, and attract media attention.

Lynn Harsh remains a teacher and mentor at heart. That is evidenced by her personal commitment to helping other think tank executives. She speaks to other CEOs several times a month and acts as an advisor to many of them. She also readily shares EFF's operating plans to encourage other state think tanks to emulate EFF's success in their own states.

Harsh considers her networks within the free-market state think tank community to be not only critical to building the conservative movement, but also essential to what she is about.

CHAPTER 7
CASE STUDY #3: CENTER FOR POLICY RESEARCH OF NEW JERSEY

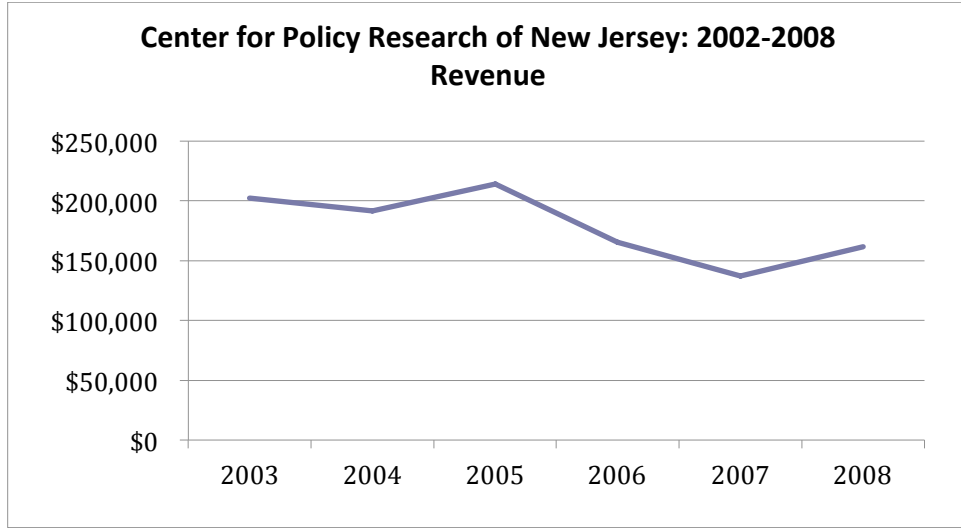
Introduction

Unlike Illinois or Washington State, both of which have several long-standing, nonprofit policy institutions, New Jersey had no solid tradition of free-market think tanks prior to the formation of the Center for Policy Research of New Jersey. The idea of a state think tank gained favor initially in 1997 when the Center was incorporated and received its charitable tax status, but the group did not become active until Gregg Edwards, a political insider, assumed the reins as president in 2002.

The Center for Policy Research (CPR) was selected as a case study because of its contrast to the Illinois Policy Institute. CPR was launched the same year as IPI, also contended with a legislature dominated by the Democratic Party, had an inactive board, and faced numerous fundraising challenges. However, by 2008, IPI was the most successful think tank in terms of revenue growth in this study, while CPR ranked second to last with \$137,209 in annual revenue. (See Chart 7.1.)

Whether due to the newness of the free-market think tank concept in New Jersey, the group's underutilization of nonprofit networks, or other factors to be explored here, CPR constantly struggled for a solid footing. Today, for all intents and purposes, the Center for Policy Research of New Jersey no longer exists.

Chart 7.1: Center for Policy Research of New Jersey's Revenue Growth



History

In 2001, New Jersey Republicans were in dire straits. They had just relinquished the governorship and both houses of the state legislature to the Democrats. Many political insiders felt that Republicans had lost the elections because they lacked a forward-looking policy agenda. The party no longer connected its political decisions to particular principles, and voters saw little difference between Republicans and Democrats.

The end of Republican rule put many people out of a job, including Gregg M. Edwards, who had served as executive director of the New Jersey Senate since 1994. In that role, he helped write laws concerning automobile insurance, unfunded state mandates, deregulation of the electric utility industry, and government transparency. Prior to that, the New Jersey native was twice elected to the Hamilton Township Board of Education in Mercer County and held the position of board president for two years. He also served on Hamilton's zoning and planning boards. In addition, he was familiar with

the ways of Washington, D.C., having worked as chief of staff to the late U.S. Representative Bob Franks during Franks' first term in office.

Edwards viewed his sudden unemployment as an opportunity to create something that had been lacking for Republicans: an independent organization that would conduct research and develop free-market solutions to New Jersey's policy problems. Edwards was not alone in his thinking. Business and trade organization leaders thought that their interests would be better served if an institution existed to provide policy research to conservative members of the legislature so that Republicans could regain their footing among the voters.

In fact, a previous effort to start a free-market think tank had evolved to the point where the Internal Revenue Service had approved its 501(c)(3) charitable tax status before the project was abandoned. So Edwards was able to launch the Center for Policy Research of New Jersey quickly and became its first and only president. Like many other state think tanks, CPR covered a broad range of state issues such as public education, land use, transportation, and health care, but it zeroed in on fiscal policy, particularly tax policy.

CPR differed from other state think tanks in regard to its funding. Many groups rely initially on seed money from State Policy Network-facilitated grants or from a small number of private foundations. By contrast, CPR depended almost exclusively on the corporate community for its financial support.

By the third year of its operation, CPR reached its peak income of \$213,000. In a letter to David G. Tuerck, then executive director of Beacon Hill Institute—a research

center at Suffolk University in Boston—Gregg Edwards wrote: “CPR has become a leading voice on New Jersey's tax and spending policies.”

Notwithstanding its steady success in its early years, CPR remained a one-man show. The group utilized contractors but never reported personnel beyond Edwards in the filing of its annual 990 tax form with the Internal Revenue Service.

Three years after Edwards' letter to Tuerck and six years after CPR's founding, the organization was all but disbanded. It no longer has a Web site, and its president has resumed his job in state politics as policy director to Republican Governor Chris Christie.

Internal Factors

Board of Directors

With the exception of one member who left the board in 2007, CPR's board of directors was made up of the same six people between 2006 and 2008. Edwards did not serve on any other nonprofit boards, but his other board members did and were well connected in the community and in the state. Despite its networks, the board was not instrumental or well-utilized in raising funds for the group.

Leadership

As indicated, CPR's fundraising model of seeking support from corporations meshed well with Gregg Edwards' background and professional networks. As executive director of the New Jersey Senate for six years, he came into contact with many corporate lobbyists, especially in New Jersey's sizeable pharmaceutical industry. Moreover, he had established relationships with trade groups and associations that were engaged on a daily basis in the policy decisions being made in Trenton.

But Edwards characterizes the Center's fundraising as unsuccessful for a variety of reasons. First, he found that corporate support was unreliable. Businesses view their contributions to think tanks as strategic philanthropy. In essence, they are interested in advancing certain political results and believe that think tanks are useful in shaping the public policies that support these aims. They are less committed to the group's mission of advancing personal liberty and promoting less government intervention. This reality is true for many market-oriented think tanks. As the economy faltered, many corporate budgets were reduced, and CPR found itself competing with corporate lobbyists for a smaller pool of funds. As a 501(c)(3) charitable organization, CPR could not directly influence the passage of legislation as lobbyists could, and this put it at a disadvantage when vying for limited corporate dollars. On a related note, Edwards found that there was also little institutional commitment to supporting CPR. This meant that if his point of contact left the corporation or moved to a new position, he had to rebuild relationships with different individuals and convince them anew to fund CPR. The reason corporate fundraising proved problematic for CPR was that it relied almost exclusively on corporate support rather than gifts from individuals and private foundations for its sustenance, as described in the subsequent factors.

Second, he was unable to access the grants through State Policy Network upon which so many other groups rely. His observation was that SPN was more focused on increasing the number of think tanks in the early 2000s in order to achieve representation in every state than it was on sustaining the ones like his own that were already established. While the number of state think tanks grew at a rate of 60 percent in the 2000s, there is ample evidence from other interviews that SPN was directing funds to

both new and well-established groups. The more likely scenario was one that Greg Blankenship of the Illinois Policy Institute voiced: With a greater number of groups, the grant process had become more sophisticated, and CPR was not as competitive in developing programs that could be funded.

Finally, wealthy individuals in New Jersey never materialized as a source of revenue as Edwards had hoped they would. In his estimation, individuals were unwilling to support his cause because donating to a public policy institution was an uncommon activity in New Jersey. This was true even when he explained to prospective donors the threat from a new progressive think tank, New Jersey Policy Perspectives (NJPP), that was advancing liberal policy ideas and receiving major support from private foundations in New Jersey.

It should be noted that due to the considerable up-front expense, Edwards did not engage in any mass marketing, such as direct mail, to attract individual donors. Direct mail is an important fundraising tool for many think tanks because it allows them to identify and cultivate like-minded individuals to support their cause. Therefore, Edwards was making his determination about individual behavior based on his dealings with a small group of people. In addition, it is likely that other states have a dearth of public policy institutions. It would be useful for future study to gauge this impact on fundraising.

External Factors

State Economy

Between 2006 and 2008, New Jersey's unemployment rate increased by 69 percent, placing the state between Washington and Illinois. It also is positioned between these two states in population with 8.7 million residents.

According to the regression analysis, the economy had statistically no effect on revenue or media growth, and the performance of the Illinois Policy Institute as compared to the Center for Policy Research seems to bear this out.

Political Environment

Democrats made up the majorities in New Jersey's upper and lower houses between 2006 and 2008. (See Table 7.1.) Also during those years, Jon Corzine—a Democrat—was the state's governor. It was not until 2009 that the political tide turned with the election of Chris Christie, the first Republican governor in 12 years.

The Republican minority in the state governing bodies could have been an advantage to the only think tank providing market-oriented policy solutions that are more favored by the political right, which may have needed these ideas more than ever. Moreover, Edwards had many inside political connections from his prior work experience. In this environment, CPR had the chance to establish its specific niche among donors and gain visibility among lawmakers and the media. Alternatively, if the Democratic majorities made it impossible for CPR to advance its ideas, as Edwards contends, prospective donors may have remained unconvinced that a think tank could succeed in influencing the policy decisions in Trenton. The latter conclusion does not

seem viable, however, when one compares CPR to think tanks in other states—such as Illinois—that also were dominated by the Democratic party.

Table 7.1: Composition of New Jersey Legislature by Political Party Affiliation for Years 2006–2008

	General Assembly		Senate	
	D	R	D	R
2006	49	31	22	18
2007	49	31	22	18
2008	48	32	23	17

Competition

Prior to the formation of the Center for Policy Research, New Jersey was home to two other nonprofit organizations with ties to public policy. One was Excellent Education for Everyone, or E3, which was founded in 1999 to advance education reform initiatives at the state level. Specifically, E3 targeted urban areas and advocated for school choice policies whereby parents could choose to select public or private schools that best suited the needs of their children. In 2008, E3 was a \$1.6 million operation.

The other organization was the New Jersey Family Policy Council, which had been established in 1996 to respond to the breakdown in traditional families. Through education and legislative action, the Family Policy Council addressed such issues as divorce reform, juvenile crime, and marriage protection. It raised just under \$1 million in 2008. However, there seemed to be little to no overlap between the Family Policy Council’s policy priorities and CPR’s.

The evidence shows that certain nonprofits targeting education and social issues were successful in galvanizing support for their niche policy agendas. However, Edwards was correct in stating that there was no other think tank operating in the state that gave

voice to broader free-market ideals. This may have been a disadvantage if it meant that Edwards had to educate potential funders on the role of such a think tank. Moreover, CPR did not benefit from the social cohesion that would have been generated as a result of having a large number of people engaged in multiple right-leaning policy groups.

Media Penetration

Edwards was a recognized expert on New Jersey fiscal policy during his tenure as CPR's president and often published op-eds in the major daily newspapers circulating in New Jersey, including the *New York Times* and the *Philadelphia Inquirer*. As described below, Edwards developed a friendly rivalry with the liberal-leaning New Jersey Policy Perspectives group, and this helped to win media attention for CPR's work.

Although not included in the results of media penetration, Edwards was also a frequent guest on television and radio public affairs programs. This may have had an impact on the print media results if journalists became more likely to seek his opinion after noting his appearances on radio or television.

As its financial state became more precarious between 2006 and 2008, CPR sustained some semblance of a presence in the media, but this, too, was declining. According to the regression analysis, CPR's media was predicted to grow by 83 percent. The data indicated that it grew by 69 percent, or 15 percent below what the model had predicted. This gave it a rank of 18th in media penetration among the 39 state think tanks studied.

Nonprofit Networks

Linking Social Capital

Before forming CPR, Gregg Edwards had never heard of the State Policy Network, and his relationship with SPN was not particularly productive. He attended its annual meetings until 2006 but then stopped when he could no longer justify the expense. Periodically, he participated in monthly conference calls. Further, he found that he received little in exchange for the \$500 annual membership dues. He expected more regular contact from a membership organization. Aside from procuring grant money, however, it is not clear what interaction he was seeking. Unlike the Illinois Policy Institute and the Evergreen Freedom Foundation, both of which considered SPN essential to their success, CPR was unwilling or unable to utilize this vertical network in a way that would create linking social capital. Nor was CPR's lack of connection to higher associational levels limited to SPN. Edwards attended the Heritage Foundation's annual Resource Bank meeting for policy experts sporadically but did not find it very useful. Overall, he was unsuccessful in using this vertical network to build social ties that might have connected him to essential resources.

On the other hand, Edwards built ties with some like-minded organizations. Starting in his early career working in Washington, D.C., as chief of staff to U.S. Representative Bob Franks, Edwards was familiar with the Cato Institute and the Heritage Foundation. In fact, he envisioned building a think tank in New Jersey that would be modeled after these conservative institutions.

In its first years, CPR extended its vertical networks in a number of ways. It held a seminar in conjunction with the Cato Institute and collaborated with other right-leaning

groups such as the National Center for Policy Analysis in Texas, the Heartland Institute in Illinois, the Beacon Hill Institute in Boston, the Manhattan Institute in New York, and the Tax Foundation in Washington, D.C. All of these policy institutions were influential, well-established, well-networked, and valuable for building linking social capital. However, because of its lack of media activity, CPR was less able to capitalize on these connections from a marketing perspective.

Bonding Social Capital

Edwards was perhaps best at using his in-state political connections with lobbyists and trade associations to win access to influencers and sources of revenue. These strong ties opened doors to the New Jersey lawmakers and corporations that provided CPR with its early success.

He had less contact with other state-based think tanks and rarely connected with their executive directors, because he did not find value in this activity. Edwards also did not work with Excellent Education for Everyone, the policy institution already operating in New Jersey that shared CPR's interests in education reform. In summary, there was very little evidence of using horizontal networks to build bonds with homogenous groups.

Bridging Social Capital

Edwards made at least one attempt to reach beyond his natural networks to bridge with another nonprofit organization. He became acquainted with the executive director of the liberal New Jersey Policy Perspectives. Founded in 1997 to advance progressive policies on tax reform, transit, and wage issues, NJPP raised approximately \$500,000 annually between 2006 and 2008. CPR co-hosted events with NJPP, and Edwards benefited from increased media exposure as a result. Over time, New Jersey journalists

would seek out CPR for an alternative perspective when they mentioned New Jersey Policy Perspectives in a news story. Edwards also met with the New Jersey Council of Grantmakers, which is a statewide association of community, corporate, family, government, and independent funders. His purpose was to raise the visibility of think tanks in general, and CPR in particular, in the philanthropic community, but this effort met with no success. The Council was supportive of neither the Center for Policy Research nor New Jersey Policy Perspectives.

Since the demise of CPR, two new free-market policy groups have been formed in New Jersey: the Common Sense Institute of New Jersey and Solutions for New Jersey. Edwards, from his post in the Christie administration, has heard of neither of them. In his opinion, New Jersey lacks the resources needed to support two state-based free-market think tanks.

CHAPTER 8 DISCUSSION AND CONCLUSIONS

Introduction

The research question posed in this study was what contributions networks make to the success of state-level market-oriented think tanks. Think tanks are generally described as nonprofit institutions made up of experts who achieve change by offering policy prescriptions to lawmakers and by strategically marketing their ideas in the media. They have been part of the American political landscape since the turn of the 20th century, and there are now hundreds of such organizations across the country. This study was directed to the groups on the conservative side of the political spectrum that produce policy research in support of their political philosophy of a limited role for government, free enterprise in the marketplace, and greater individual liberty.

In order to fully examine the research question, it was necessary to define what constitutes effectiveness for a think tank. In Chapter 1, the multiple activities of think tanks were enumerated, ranging from conducting scholarly research on issues being debated by national and state legislatures, to giving briefings to policymakers, to marketing ideas through the media. However, there is rarely a direct association between these activities and changes in specific public policies. This is due to the complex nature of the legislative and political process and the multiple special interests that are involved in crafting legislation. Nonetheless, scholars tend to agree that think tanks wield influence in defining and advancing a policy agenda. (Smith, 1991)(Rich and Weaver, 2000)(Abelson, 2002)(McGann and Weaver, 2002)(Rich, 2004)

In reviewing literature on think tanks that spans more than two decades, two factors emerge as contributing to think tank effectiveness. One is the think tank's ability to secure financial resources. With greater operating revenue, ideally from diverse sources, think tanks have the institutional capacity to hire experts, market their research products, and operate independently. The second factor is the think tank's ability to win media attention. Studies have shown that lawmakers are influenced by what they read and watch in the media (Rich and Weaver, 2000), so a greater number of media appearances may give think tanks a larger voice in policy debates. Recently, researchers have found that think tanks can enhance the effectiveness of these two factors by extending their outreach to collaborate with other groups through networks. This allows them to leverage their influence, raise money, and increase their impact. (Crutchfield and Grant, 2008)

The effect of nonprofit networks has been studied in regard to national think tanks but not for the growing number of state-level organizations. Today, there are 56 market-oriented state think tanks—at least one in every state—that mirror their larger national counterparts in their commitment to policy research based on a specific worldview and their zeal for marketing their intellectual products to lawmakers and the media. The hypothesis is that these state groups are also more effective in raising funds and securing media attention when they successfully engage their nonprofit networks to build linking, bonding, and bridging social capital.

However, there are different variables at the state level that must be considered before making that assertion. External factors such as the state's population, economic situation, or political environment may impact a group's ability to raise funds or draw media attention. In addition, organizational factors such as the composition of the board

of directors or the leadership of the executive director may expand or limit a group's ability to build and leverage its networks.

Based on the age of the state think tanks and the availability of financial data, 39 of the 56 state groups were selected for the study. The process by which the various state-related factors were evaluated consisted of conducting quantitative research through regression analyses. The purpose was twofold. First, insight was sought into the level of correlation between various independent variables such as the organization's age, the state's economy and political environment, and the group's revenue and media growth between the years 2006 and 2008. Second, a model to predict think tank behavior in funding and media was constructed to compare to the actual results of the groups studied. Using the model as a guide, the relative success or failure of each think tank could be examined.

The results illustrated that the most significant factor in a state think tank's funding growth was the age of the organization. There was a 99.2 percent probability that the older the organization was, the more money it would raise. The state's economy, political environment, and population were not statistically relevant. Nor was the factor of competition for funding from similar groups meaningful to the equation. However, the qualitative analysis on competition told a different story, which will be examined subsequently.

In the analysis of media penetration, none of the independent variables—state population, economy, or political structure—had a noteworthy impact on the think tank's growth in this area.

The predictive models generated from the regression analyses provided the expected revenue and media growth for each think tank between the years 2006 and 2008. These results were compared to the actual performance of each group, and the variance was noted. Based on this information, three state think tanks were selected for qualitative study to determine whether their results in the quantitative stage could be correlated to their use of formal and informal nonprofit networks in forging social capital. Interviews were conducted with current and former executives at the Illinois Policy Institute, the Evergreen Freedom Foundation of Washington, and the Center for Policy Research of New Jersey.

In this chapter, the key findings from the three case studies will be examined. Particular attention will be paid to the information gathered from interviews and the histories of the organizations. Then limitations of the study will be evaluated for future research potential. Finally, conclusions will be drawn about the use of nonprofit networks and their contribution to state think tank effectiveness.

Significant Findings

Illinois Policy Institute

An observer might conclude that the escalated growth of the Illinois Policy Institute was due to one factor—the arrival of John Tillman as its chief executive officer—and this assumption would not be without merit. Quantifiable data in terms of revenue and media penetration mark IPI as a success story. In the two-year period with John Tillman as its leader, it went from a struggling policy group to a leading institution among market-oriented state think tanks. The qualitative analysis supports the

significance of his leadership, but relying on that factor alone may oversimplify the impact of other indicators.

In order to be effective, think tanks must secure sufficient financial resources and build successful marketing programs. (Rich and Weaver, 2000)(Abelson, 2002)(Rich, 2004) Further, they do well to seek multiple funding sources in order to have the freedom to operate independently. (Weidenbaum, 2009) Tillman embraced his role as chief fundraiser and raised more than 65 percent of IPI's operating revenue from residents of the state. This approach represented a stark difference from the practices of IPI's founder, Greg Blankenship, who relied on sources outside the state, like grants from State Policy Network, which were restricted to certain projects and much less dependable. Tillman also brought business and marketing expertise to IPI to extend the Institute's influence in the media and among policymakers. He had a thorough grasp of what it takes to make a business viable and applied these techniques to running IPI. For instance, he invested time and effort in understanding the policy "market" and contacted experts who could add to his understanding of the think tank world. He also used entrepreneurial approaches to sway both liberal and conservative state policymakers.

The influence of the board of directors was another internal factor considered in the effectiveness of state think tanks. Significantly, IPI's board was not pertinent to the organization's fundraising success or its ability to collaborate with other nonprofits. This supports the research of Guo and Acar (2005), who found that the board's role is more essential among larger, more established nonprofits than it is among newer organizations.

In terms of external factors, the qualitative review produced overall results that correlated to the quantitative data. Specifically, Illinois' population size, economy, and

political dynamics were not influential in IPI's success. However, IPI's competition within the state from other think tanks deserves consideration. Of the three states profiled in this study, Illinois had the most robust representation of policy-oriented nonprofit organizations. In addition to the nationally positioned Heartland Institute, the state had four other organizations that have been operating for at least 15 years on related public policy issues. Cumulatively, these groups secured \$10 million a year in contributions. Tillman recognized the necessity of branding IPI so that it would have a distinct niche to distinguish it from these other firms. At the same time, he found ways to collaborate—rather than compete—with these rivals for IPI's funding and media attention. The practice of nurturing allies to share knowledge and bring about change is one of the essential attributes in high-impact nonprofits, according to Crutchfield and Grant (2008). As will be explored subsequently, the existence of these other groups and IPI's involvement with its horizontal networks were instrumental in generating bonding social capital as well.

The qualitative analysis also provided insights into the role of vertical and horizontal networks in creating social capital. Both executives of the Illinois Policy Institute utilized its vertical networks to link to a broader policy movement, gain knowledge, and secure new funds. They engaged regularly and consistently in State Policy Network activities as well as the Heritage Foundation's various meetings that involved national and state policy experts and institutions. These meetings provided valuable connections to potential donors and in-depth training on fundraising and media techniques.

Both leaders also used their horizontal networks. Blankenship used the political clout of several like-minded groups to create the cohesion needed to influence policy outcomes. Tillman was embedded deeply in the networks of national and state policy groups on the political right in order to advance his own organization as well as to help others through various educational activities. As other scholars have found, one of the defining differences between conservative and liberal groups is the ability of conservative groups to develop a unified message. (Bai, 2007)

Tillman used horizontal networks to greater advantage in building bridging as well as bonding social capital. He worked with progressive or liberal groups on issues of common interest to raise IPI's visibility and advance its agenda. In addition, IPI's leader built his personal weak-tie networks. When he entered the think tank world, Tillman had a strong-tie corporate network but a weak-tie policy network. This is similar to many leaders who have professional experience in certain areas. Tillman built his weak-tie network by educating himself about the conservative movement and meeting with those who could extend his networks. He used his strong-tie corporate network to secure financial resources for the organization.

In IPI's formative years, there was clear evidence that Blankenship was utilizing various connections to some degree in order to build linking and bonding social capital. Nonetheless, by 2007, IPI was struggling financially and was unquestionably on a downward trajectory. The substantive change at IPI occurred as a result of the leadership skills and marketing acumen of John Tillman, who introduced a greater degree of competence into the Institute's governance and management. More than that, he recognized the need to develop strong and weak ties, both institutionally and personally,

to build the stature of the organization and connect it to the larger free-market policy community. Significantly, he was also purposeful and selective in building these vertical and horizontal networks. He did not build relationships for their own sake, but with the objective of advancing the work of IPI and the conservative movement as a whole.

Evergreen Freedom Foundation

As one might expect in an organization approaching its third decade of operation with \$2.5 million in annual revenue, the board of directors of the Evergreen Freedom Foundation is essential to the group's fundraising and networking efforts. The executives who serve on EFF's 17-member board provide formal and informal links to potential funders and the larger community, as well as governance expertise and personal financial backing.

The quantitative data on revenue growth were unremarkable in that EFF performed as expected for an organization of its age. This was confirmed in the case study in which Executive Director Lynn Harsh described the foundation's successful fundraising programs, which are centered on raising funds from individual donors. More than half of EFF's funds comes from 5,000 residents of Washington State. As Tillman in Illinois also discovered, the diversity of funding sources gives a think tank a greater measure of freedom and flexibility.

However, the quantitative data on media penetration delivered a surprise. According to the regression analysis, EFF was the worst-performing think tank in terms of media attention. This contradicts the claims of EFF and may be due to variations in the source data, as well as the group's emphasis on electronic media outlets.

As with IPI, leadership is one of the critical internal factors that distinguish the Evergreen Freedom Foundation. The qualitative analysis revealed that the ongoing involvement by the original founders provided a continuity of vision and management without stifling the group's innovation. Harsh and her co-founder, Bob Williams, nurtured the steady growth of this free-market organization in a state that is dominated by a liberal-leaning political environment.

The external factors of the state's population size, economy, and political situation had no significant impact in the qualitative examination. However, the in-state competition from other policy organizations is noteworthy. Washington State is home to two nationally focused organizations, the Discovery Institute and the Second Amendment Foundation, which raised a total of \$4 million in 2008 from sources inside and outside the state. Meanwhile, two state-centric policy groups, the Washington Policy Council and Washington Research Council, generated nearly \$2 million that year from various funding streams. It did not appear that these organizations had a detrimental effect on EFF's fundraising efforts, as evaluated by the size of EFF's operating budget as compared to two other state-based groups founded in the same year in other parts of the country with a similar level of competition. On the contrary, the strength and tradition of these institutions within the state might have been advantageous to EFF in generating social capital. The various groups engaged more participants and donors in the work of policy institutions and created consensus and positive public opinion for certain policy ideas. Moreover, Harsh defined EFF's relationship with the other market-oriented policy groups in Washington State as "collaborative rather than competitive."

EFF's use of vertical and horizontal networks is no less apparent than IPI's. Its institutional bonds to the State Policy Network and the Heritage Foundation generated linking social capital that EFF used to access new funds, amplify its ideas and message, and gain expertise in fundraising and media that enhanced results in these areas.

Consistent with an organization of its age and size, EFF developed a more formalized approach to forming bonding ties in its horizontal networks. It devoted personnel resources to assisting other conservative groups through training and mentoring activities. It also had a staff person assigned to building its grassroots networks through its broad-based Citizen Action Network, which sought out groups that shared EFF's interest in freedom and free enterprise.

Bridging activities were evident but less significant in EFF. It sought non-traditional allies to extend its networks to new audiences, from the policy world to Hollywood stars. EFF's early adoption of new approaches to securing media attention has introduced it to new audiences, as measured by the growth in its membership and email lists. Using its own radio program, blogs, and social media tools, EFF responded rapidly to the changing environment of state-based media where traditional news outlets have declined and new electronic venues have proliferated.

EFF has experienced steady growth over the past 19 years. Lynn Harsh, like Tillman in Illinois, has turned network building into a strategic activity. It is not an afterthought, but an essential element of EFF's business plan that receives personnel and financial resources.

Finally, Harsh developed new personal networks to her advantage. While her prior expertise in the education arena was beneficial, she also recognized the need to build her weak-tie networks to include policymakers, the media, and potential funders.

Center for Policy Research of New Jersey

Several factors contributed to the failure of the Center for Policy Research of New Jersey, not the least of which was its inability to utilize, or build new, potential networks successfully.

From an organizational perspective, CPR's leadership and board of directors were weak in certain key areas. The president, Gregg Edwards, had a wealth of policy experience, which was valuable for navigating the state's political terrain and understanding the key influencers. Yet he was less adept in the business techniques of marketing and fundraising. By relying almost exclusively on corporate supporters, his operating revenue could drop precipitously if one or two gifts were lost in any given year. Researchers have also found that a diverse base of support gives an organization the independence that it needs to operate. (Weidenbaum, 2009)

CPR's board of directors had the potential to bridge to the larger nonprofit community, but was never engaged to do so by Edwards. Consequently, it did little to improve the organization's financial outlook. However, as evidenced by the Illinois Policy Institute, an ineffective board may not be critically detrimental to a newer policy organization.

As with the two other case studies, most of the external factors considered in the analysis did not impact the effectiveness of the New Jersey group. CPR operated in a state that was dominated by the Democratic Party and thus less likely to adopt the policy

prescriptions of a free-market think tank. Nonetheless, CPR had one advantage in the political background of Gregg Edwards. His extensive connections from his recent experience working in the New Jersey Senate may have been instrumental in gaining access to policymakers in Trenton. On the other hand, Edwards' long involvement in partisan politics might have called into question his commitment to independent research and analysis. The two other external factors—the size of New Jersey's population and its economy—did not reveal themselves to be significant in the qualitative analysis.

However, the lack of competition from other think tanks in New Jersey may have been a considerable external factor in CPR's dismal financial results. Edwards cited the fact that New Jersey did not have a tradition of think tanks, and few individual donors understood the Center's role. His analysis tells only part of the story. The sole policy group operating in New Jersey with interests parallel to CPR's was Education for Everyone. This organization advanced education reform through school choice options and raised \$1.6 million annually. In comparison, Washington State and Illinois had several prominent, long-established policy institutions that raised \$6 million and \$10 million a year, respectively. As Edwards surmised, a more robust presence of rival groups in a state might be beneficial from a fundraising perspective because of the larger number of individuals who are aware of these institutions and financially supporting them. Another benefit may be the social capital that is built from collaborative efforts and from engaging more people in these causes.

Despite CPR's internal and external challenges, it was not entirely inactive in developing its vertical and horizontal networks, but it may have been inefficient in doing so. As with the other executives in this study, Edwards sought out like-minded firms for

collaboration. In this area, he recognized the need to build CPR's strong-tie connections and worked with several large, influential policy institutions. However, his lack of engagement in State Policy Network and the vertical networks that would have given him access to ideas, money, and the broader conservative movement was detrimental to CPR's growth. While all of the other executives who were interviewed considered SPN "essential," Edwards found the relationship less valuable.

The differences between his approach and the approaches of his other state think tank colleagues were threefold.

First, Harsh and Tillman both stated that their success was due to a systematic, results-oriented engagement in network building. Both invested a significant amount of thought, time, and money in the process. Edwards, meanwhile, was less disciplined and strategic on this level.

Second, as indicated earlier, Harsh and Tillman identified where their personal ties were weak and focused on building these connections. Edwards concentrated on his natural, strong-tie networks in the corporate and legislative community, which limited CPR's exposure.

Third, Tillman and Harsh voluntarily shared their expertise with other nonprofits in their horizontal networks to foster social cohesion. Their objective was to build a stronger conservative network, recognizing that this would also benefit their own organizations. Edwards, by contrast, interacted rarely with his counterparts in the states and made no concerted effort to share his knowledge or skills with other state think tanks.

The Heartland Institute's Joe Bast advised IPI's Blankenship in Illinois that reaching the five-year mark was critical to a think tank's success. The comparison

between IPI and CPR shows, however, that success requires more than just staying power. The five-year mark may be the point at which network-building, fundraising efforts, and media outreach must coalesce in a productive manner to allow the organization to grow.

Limitations and Future Study

The limitations of this research are noted below in order to indicate areas for potential future study.

1. The small sample size and lack of sufficient financial data may have skewed the results. In the statistical analysis, four think tanks located in Maryland, Indiana, South Dakota, and Vermont were eliminated from the study. All were founded before 2005 but did not file tax returns in one or more years between 2006 and 2008. The inclusion of these organizations in the study might have altered the results for other think tanks formed in the same years. Further, it is difficult to develop a strong correlation between dependent and independent variables in a regression analysis with such a small sample size of 39 cases.
2. The number of citations from traditional media may no longer be a relevant measurement of think tank effectiveness. Past studies on think tank success have counted citations from major news sources to indicate the organization's ability to market its message. (Berry, 1999)(Abelson, 2002) However, as demonstrated by EFF, online sources may be becoming more important for influencing policymakers and public opinion in the states and are worthy of inclusion when studying media penetration.

3. The sources of think tank funding should be examined further. Since free-market think tanks do not accept government funds, they must secure support from private foundations, corporations, and individuals. However, the IRS 990 tax return does not require nonprofits to report on specific sources of support, so the distribution of contributions among these three sources was not available to include in the regression analysis. This information was uncovered in the course of the qualitative analysis, however, and underscored the importance of individual donors for IPI and EFF in achieving the diversity of funding that is essential for think tank independence. (Weidenbaum, 2009) Moreover, engaging more individuals may be essential for building the trust and cohesion needed for social capital to evolve.

Conclusions

Social network theorists have concluded that networks generate various forms of social capital that can be beneficial for trust, reciprocity, and information exchange. (Putnam, 2000)(Passey and Lyons, 2006) From an organizational perspective, nonprofits may work in vertical networks to generate linking social capital or horizontal networks to generate bridging and bonding social capital. Some scholars have placed a greater value on bridging social capital, while others have found that nonprofits require both bridging and bonding social capital to aid in information exchange and the attainment of financial resources. (Coffé and Geys, 2007)(Ashman, Brown and Zwick, 1998) Experts have further discovered that national think tanks utilize nonprofit networks to build coalitions, leverage their resources, and advance their cause. (Crutchfield and Grant, 2008) Also,

state think tanks have been thought to work in networks to share research and build substantial platforms for their agendas. (Miller, 2007)(Clarkson, 1999)

This mixed-method study revealed that networks and the social capital that they produce play a definitive role in most effective state-based market-oriented think tanks. However, it cannot be asserted that these think tanks are more effective as a result of these networks without taking into consideration the following factors.

First, the quantitative data demonstrated that the organization's age had the most statistical relevance for the capacity of a think tank to raise money. This was validated by executives in the case studies who believed that reaching the five-year mark is a milestone that ushered in a higher degree of credibility, a solidification of networks and relationships, and institutional capacity brought about through fundraising activities. However, an anniversary is no guarantee of success, as Gregg Edwards discovered at the Center for Policy Research of New Jersey. Further, the think tanks omitted from this study due to a lack of financial data, as described in the limitations, might have altered the significance of organization age in the final analysis.

Second, the study showed that, from a quantitative or qualitative perspective, the state-specific, independent variables of population size, economy, and political environment were not relevant to the performance of think tanks in terms of securing funds or gaining media attention. The one exception was the factor of competition from similar state organizations. The case studies revealed that the state's tradition of policy institutions might contribute to think tank effectiveness. Think tanks were more successful in building networks, garnering media attention, and raising funds from individuals in states—such as Illinois and Washington—with multiple policy-oriented

groups than in the state—New Jersey—where there was no history of these organizations. One might conclude that multiple groups provide beneficial competition and a culture of giving. More important, though, they amplify policy ideas, mobilize a greater number of people by way of participation and donations, and foster information exchange and social cohesion.

Third, an institution's board of directors may or may not be instrumental in organizational success. However, the leadership and skills of the executive director were noteworthy and relevant. As Micklethwait and Wooldridge discovered among national conservative think tanks, the most successful organizations operate like businesses and build strong funding mechanisms. (Micklethwait and Wooldridge, 2004) The leaders of the most effective state think tanks also used solid business practices, such as strategic planning and marketing plans, to create impact. Their prior professional experience before leading the think tanks was useful, but it was not the only factor that dictated success. The best leaders recognized the markets in which they had weak-tie connections and were willing to build these relationships over time.

Finally, it was evident that all of the leaders, including Blankenship at the Illinois Policy Institute and Edwards at the Center for Policy Research, built networks. To varying degrees, they used vertical networks to increase their stores of linking social capital and access influential players, funding, and information. They tapped into horizontal networks to produce bonding or bridging social capital to create unity, extend their outreach, or attain more media attention.

The Illinois Policy Institute, which demonstrated the most success in the quantitative analysis, was particularly successful in developing networks that built

bridging social capital. The Evergreen Freedom Foundation, which performed at average compared to the model, formed bonds with homogeneous groups as a central activity in its networking. The least successful organization, the Center for Policy Research of New Jersey, did very little on either the vertical or horizontal level to build linking, bonding or bridging capital.

IPI and EFF had a more advanced approach to nonprofit networks. In short, they:

- **Embed in vertical networks.** The successful CEOs viewed groups like State Policy Network and the Heritage Foundation as valued resources. Through these institutional networks, the think tanks' leaders connected to a larger cause of which their nonprofits were a part. Therefore, they were willing to commit time and resources to connecting, engaging, helping, and mentoring the executive directors and staff from other groups. They believed that building the capacity of other organizations would ultimately benefit their own think tanks. Significantly, they also found that the vertical networks had a direct impact on their fundraising and media success due to the comprehensive training that they and their staff received at meetings within the network. Finally, the meetings allowed them to link to philanthropists and corporate donors that they would not otherwise have a chance to meet.
- **Select horizontal networks with care and authenticity.** Horizontal networks that produce bonding social capital helped the state policy groups to collaborate and share knowledge. However, not all networks have the same value for advancing the goals of a think tank. While all of the executive directors in this study were engaged in building networks at some level, Blankenship and Edwards

reaped few dividends for their efforts either in terms of funding or in terms of visibility. Tillman and Harsh, on the other hand, excelled in identifying and managing the relationships that would be most beneficial to their organizations and to the larger conservative movement. A smaller nonprofit with limited resources must objectively evaluate the usefulness of each network before devoting time and money to building it.

- **Form bonding as well as bridging capital in horizontal networks.** Ashman, Brown and Zwick (1998) discovered that nonprofit organizations were most successful when they used resources to build bonding and bridging social capital. This was also an observation among state think tanks. Bonding with homogeneous groups unified the conservative message, leveraged resources, and built social cohesion. Bridging activity with weak-tie connections, such as with firms not typically aligned with the conservative movement, generated media interest and helped state think tanks to broadcast their message well beyond their natural base of supporters. This may be particularly important in states where the Democratic Party is dominant and innovative tactics to advance market-oriented policy changes are required. The common element for both IPI and EFF was their willingness to view these rivals as collaborators that could increase their exposure to new markets.
- **Invest time and money in network-building activities.** Successful state think tanks integrated network building into their business and professional development plans. The executive director took a leadership position, but it was

an activity that involved all staff members. Networking activity also required an investment in time and financial resources to be most effective.

- **Develop personal weak-tie networks.** Each executive director had the advantage of deep personal networks that they were willing to engage to market their institutions. Harsh came from the academic world, Tillman had a business background, and Blankenship and Edwards knew the ins and outs of the policy realm. However, Harsh had to become knowledgeable about the business world, and Tillman had to learn about public policy. Their willingness to reach beyond strong-tie networks and build weak-tie connections linked them to ideas, people, and resources that they would not have accessed otherwise.

Think tank effectiveness has been judged in the past based on the ability of the institutions to gain financial resources and market their intellectual products to key audiences. This study implies that successful market-oriented think tanks at the state level are more effective if they have these two additional elements: a leader with management skills who works to extend his or networks; and the strategic use of vertical and horizontal networks to build linking, bonding, and bridging social capital. In addition, a strong culture of giving through the existence of multiple, successful, conservative policy institutions in the state is also a benefit. The nonprofit managers, funders, and governing boards involved in think tanks should examine these factors closely as the state-based policy movement continues to expand.

APPENDIX A
CASE STUDY QUESTIONS

Internal Factors

Board of Directors

- What percent of your board serves on other nonprofit boards?
- How does your board help with fundraising?

Executive Director

- Are you originally from the state? How long have you lived here?
- What was your professional experience before leading the think tank?
- How many years have you served as executive director?
- Who served as executive director before you?
- Do you serve on any nonprofit boards?

Fundraising

- What are the organization's sources of revenue?

External Factors

Competition

- Describe the policy competitors in the state.

Nonprofit Networks

Vertical Networks

- How frequently do you attend the meetings of State Policy Network?
- Have you ever spoken at an SPN meeting?
- Do your staff attend SPN meetings?
- How frequently do you attend the Heritage Foundation's Resource Bank Meeting?

Horizontal Networks

- Do you work with like-minded groups? Which ones? How?
- Do you work with organizations outside the free-market movement? Which ones?
How?

APPENDIX B
CASE STUDY BACKGROUND

Illinois Policy Institute

Interviewed John Tillman by telephone on June 23, 2010

Interviewed Gregory Blankenship by telephone on July 9, 2010

Mission

The Illinois Policy Institute is a nonpartisan research organization dedicated to supporting free market principles and liberty-based public policy initiatives for a better Illinois. As a leading voice for economic liberty and government accountability, we engage policy makers, opinion leaders, and citizens on the state and local level.

Website: www.illinoispolicy.org

Board of Directors

Gregory Blankenship, Chairman and Executive Director (through 2007)

Kevin Spudic, Treasurer (through 2008)

Terry Campo, Vice Chairman (through 2008)

John Tillman, CEO and Chairman (2007—present)

Karen Bailey, Director (2007—present)

Steve Brown, Treasurer (2008—present)

William Becker III, Board Member (2008—present)

Evergreen Freedom Foundation

Interviewed Lynn Harsh by telephone: June 25, 2010

Mission

EFF's mission is to advance individual liberty, free enterprise, and limited, accountable government.

Website: www.effwa.org

Board of Directors

Bill Conner, Chairman (through present)

Duane Alton, Trustee (through present)

Lois Dobish, Trustee (through present)

Mary Jo Kahler, Trustee (through present)

Barbara Kenney, Secretary (through present)

Tim McMahon, Treasurer (through present)

Steve Neighbors, Trustee (through present)

Richard Rokes, Trustee (through present)

Andrew Nisbet, Trustee (through present)

Alexandra Ockey (through 2007)

Ansgar Schei, Trustee (through present)

Hans Stoker, Trustee (through present)

Robert Taigen, Trustee (through 2007)

Harry E. Truitt, Trustee (through present)

Dr. John Vasko, Trustee (through present)

Jim Youngsman, Trustee (through present)

G. Robert Williams, President (through present)

Lynn A. Harsh, CEO (through present)

Alvin Starkenburg, Vice Chair (2007—present)

Center for Policy Research of New Jersey

Interviewed Gregg Edwards by telephone phone on July 15, 2010

Mission

The Center for Policy Research of New Jersey's purpose is to provide policymakers, the media and the public research and recommendations on the issues facing New Jersey and its residents through secondary research, educational forums and seminars.

Website: N/A

Board of Directors

Gregg Edwards, President (through 2008)

Stephen Distler, Chairman (through 2008)

Murray E. Bevan, Esq., Director (through 2008)

Raymond M. Burke III, Director (through 2008)

Joseph E Gonzalez, Director (through 2008)

Jay P. Kosminksy, Director (through 2008)

Stephen Salmore, Director (through 2006)

APPENDIX C



17TH ANNUAL MEETING AGENDA OUTLINE



FUNDRAISING
Proven methods and strategies to raise money



MESSAGING
Learn new ways to communicate and package your ideas



TECHNOLOGY
Practical ways to effectively integrate technology in your day-to-day operations



TACTICAL
Powerful strategies to propel your organization to the next level



POLICY
Current issues and trends in the state think movement



BUILDING BLOCKS
Learn how to build a strong foundation for your organization

SUNDAY, NOVEMBER 1, 2009

9:00am - 5:00pm <i>Grand Ballroom C</i>	RightOnline Hosted by Americans for Prosperity Foundation
5:00 - 8:00pm <i>Vanderbilt Registration Desk</i>	Registration
5:00 - 6:00pm <i>Grand Ballroom Pre-function Space</i>	Yorktown University Wine Reception
5:30 - 6:00pm <i>Eisenhower</i>	Generation Liberty Fellows Orientation
6:00 - 7:30pm <i>Roosevelt</i>	Movie Screening: "Not As Good As You Think, The Myth of The Middle Class School" Hosted by Pacific Research Institute
7:00 - 9:00pm <i>Elaine's Piano Bar</i>	En Guard! Welcome Reception featuring dueling piano players and a few special guest "entertainers"

MONDAY, NOVEMBER 2, 2009

7:00am	Registration
7:30 - 8:30am <i>Grand Ballroom C</i>	Breakfast
8:00 - 9:00am <i>Grand Ballroom B</i>	Organizing Backlash: Donors, Think Tanks, and C-4s Moderator: Drew Ryan, Executive Director Texas, American Majority • Tim Dunn, Owner, Crownquest Operating LLC, and Vice Chairman, Texas Public Policy Foundation • Brooke Rollins, President and CEO, Texas Public Policy Foundation • Michael Quinn Sullivan, President, Texans for Fiscal Responsibility
9:15 - 10:00am <i>Grand Ballroom B</i>	Plenary Session: Robert A. Levy, Chairman, Cato Institute • "Libertarian-Conservative Perspectives on Federalism, Enumerated Powers, and Tort Reform"

10:30 - 11:30am <i>Grand Ballroom A</i>	CEO Networking State think tank CEOs only Moderator: Tracie Sharp, President, State Policy Network
10:30 - 11:30am <i>Grand Ballroom B</i>	Better Than a Bedtime Story: Sell Your Institute's Message More Successfully Moderator: Bob Ewing, Assistant Director of Communications, Institute for Justice • State Rep. Matt Wingard, Oregon • Jon C. Ham, Vice President for Communications, John Locke Foundation • Tom Landess, Author and Former Professor
10:30 - 11:30am <i>Wilson</i>	Technology Policy Panel Moderator: Nicole Williams, Management & Technology Advisor, State Policy Network • Rich Cimerman, Vice President State Government Affairs, National Cable and Telecommunications Association • Jerry Brito, Senior Research Fellow, Regulatory Studies Program, Mercatus Center • David Williams, Vice President, Policy, Citizens Against Government Waste
12:00 - 1:30pm <i>Grand Ballroom C</i>	Lunch: Clayton Christensen, innovation expert, Harvard Business Professor, and critically acclaimed author

2:00 - 3:00pm <i>Grand Ballroom A</i>	YO! Conducting Youth Outreach in Your State Moderator: Kurt Weber, Senior Advisor, State Policy Network • John Dodd, President, Jesse Helms Center • Christopher Deming, Director of Campus Leadership, Mackinac Center for Public Policy • Sloane Frost, Board Director, Students For Liberty • Scott Barton, Director of Communicators Programs, Institute for Humane Studies
2:00 - 3:00pm <i>Grand Ballroom B</i>	SPNovation: Rapid Fire Ideas to Advance Your Mission Moderator: Jennifer Butler, Executive Vice President, State Policy Network • Kristina Rasmussen, Executive Vice President, Illinois Policy Institute • Taren Bragdon, CEO, Maine Heritage Policy Center • Steven Maggi, Vice President of Communications, Evergreen Freedom Foundation

2:00 - 3:00pm <i>Eisenhower</i>	Grassroots Activism with FreedomWorks: C-3 Organizations Capitalizing on Tea Party Activism Moderator: Matt Kibbe, President and CEO, FreedomWorks
2:00 - 3:00pm <i>Coolidge E</i>	Operation Great Communicator: Based on the Television Techniques of Ronald Reagan Moderator: Stephen Clouse, Founder and President, Stephen Clouse & Associates, Inc.
2:00 - 3:00pm <i>Coolidge D</i>	About Solutions: A Roadmap to State Budget Reforms Moderator: Leonard Gilroy, Director of Government Reform, Reason Foundation

3:30 - 5:00pm <i>Grand Ballroom A</i>	Development Directors Networking Session: Make Me an Expert At... Opening Remarks: Tracie Sharp, President, State Policy Network ROUNDTABLES: • Cultivating and Solidifying My Housefile - Jim Johnston, Director of Marketing, Mercatus Center • Setting Up My Planned Giving Program - JP DeGance, Senior Development Associate, Koch Industries • Building Donor Relationships - Melanie Hildreth, Director of Donor Relations, Institute for Justice • Finding the Right Lists - Thomas D. Colwell, Vice President, Conrad Direct, Inc. • Grant Writing - Dr. Lenore Edly, President, Thinkitecture, Inc. and Editor, Conversations on Philanthropy
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3:30 - 5:00pm <i>Grand Ballroom B</i>	Communication Director Networking Moderator: Yvonne Ralsky, Executive Director, Sam Adams Alliance
3:30 - 5:00pm <i>Grand Ballroom B</i>	Hey, D.C., Leave Those States Alone: The 10th Amendment Movement Moderator: Robert A. Levy, Chairman, Cato Institute • Ilya Somin, Associate Professor of Law, George Mason University School of Law and Editor, Supreme Court Economic Review • Nick Dranias, Director, Center for Constitutional Government, Goldwater Institute • Benjamin Barr, Constitutional Attorney, Wyoming Liberty Group

5:00 - 6:00pm <i>Coolidge D</i>	Development Director Reception
5:00 - 6:00pm <i>Coolidge E</i>	Communication Director / Operation Geek Farm Reception
6:30 - 7:30pm <i>Grand Ballroom Pre-function Space</i>	Reception
7:30 - 9:30pm <i>Grand Ballroom B & C</i>	Dinner: Fred Barnes, The Weekly Standard Hosted by the John Locke Foundation
9:30 - 10:30pm <i>Vanderbilt Terrace</i>	Cigar Reception

TUESDAY, NOVEMBER 3, 2009

7:30 - 8:30am <i>Grand Ballroom C</i>	Breakfast
8:30 - 10:00am <i>Grand Ballroom C</i>	Plenary Session: Steve Hantler, CEO, Right On Demand
10:30 - 11:30am <i>Grand Ballroom A</i>	Fundraising "In These Troubled Times" • Stephen Clouse, Founder and President, Stephen Clouse & Associates, Inc. • Taren Bragdon, CEO, Maine Heritage Policy Center • Brooke Rollins, President & CEO, Texas Public Policy Foundation

10:30 - 11:30am <i>Grand Ballroom B</i>	Of Microphones and Megaphones: Move from the Soapbox to the Airwaves Moderator: David Guenther, Director of Media and Government Relations, Texas Public Policy Foundation • Matthew Brouillette, President, Commonwealth Foundation • Jon Caldar, President, Independence Institute • Lee Doren, HowTheWorldWorks YouTube channel, and Crasher-in-Chief, BureauCrash
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10:30 - 11:30am <i>Roosevelt</i>	Higher Education Working Group Moderator: Jane Shaw, President, The John William Pope Center for Higher Education Policy
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10:30 - 11:30am <i>Taft</i>	Cap & Trade Panel Moderator: Myron Ebell, Director, Energy and Global Warming Policy, Competitive Enterprise Institute • Daniel R. Simmons, Director, State Affairs, Institute for Energy Research • Paul Chesser, Director, Climate Strategies Watch • Todd Wynn, Climate Change and Energy Policy Analyst, Cascade Policy Institute
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10:30 - 11:30am <i>Coolidge</i>	Tech Playground: What the Geeks are Up To • Christopher Anderson, Technology Advisor, Total Consulting Strategies • Nicole Williams, Management and Technology Advisor, State Policy Network • David Seymour, Senior Policy Analyst and Director, Saskatchewan Office, Frontier Centre for Public Policy
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10:30 - 11:30am <i>Eisenhower</i>	Rebel With a Cause: Working for the (Liberty) Man Generation Liberty Fellows only • Claire Kittie, Executive Director, Talent Market • Michael Smith, Executive Recruiter, Smith Recruiting
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11:30 - 12:00pm <i>Taft</i>	Movie Screening: "Climate Chains" Hosted by Cascade Policy Institute
12:00 - 1:00pm <i>Grand Ballroom C</i>	Lunch: Jeff Sandefer, Acton School of Business and Texas Public Policy Foundation Board Member

1:30 - 2:30pm <i>Eisenhower</i>	I ♥ Budgeting and Insurance • Gary Liff, Chief Financial Officer, Mercatus Center • Laura Dodge, CIC, Senior Account Manager, Moody Insurance Worldwide
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1:30 - 2:30pm <i>Grand Ballroom B</i>	Standing Tall when Under Fire: How to Deal with Public Attacks Moderator: Andy Matthews, Vice President of Communications, Nevada Policy Research Institute • Paul Jacob, President, Citizens in Charge Foundation • Lynn Harsh, CEO, Evergreen Freedom Foundation • Leslie Graves, President, Lucy Burns Institute
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1:30 - 2:30pm <i>Grand Ballroom A</i>	Bringing Reform to the Vory Tower Moderator: Jane Shaw, President, The John William Pope Center for Higher Education Policy • Jay Schalin, Senior Writer, The John William Pope Center for Higher Education Policy • Bob Williams, Founder and Senior Fellow, Evergreen Freedom Foundation • Rich Vedder, Director, Center for College Affordability and Productivity
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1:30 - 2:30pm <i>Taft</i>	Doing It Better: Building a Fundraising Team and Culture For fundraisers - pre-registration required • Ann Fitzgerald, President, A.C. Fitzgerald & Associates LLC
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3:00 - 4:30pm <i>Grand Ballroom A</i>	National Media Panel Moderator: John E. Kramer, Vice President for Communications, Institute for Justice • Melanie Kirkpatrick, Writer and former Deputy Editorial Page Editor, The Wall Street Journal • Robert G. Anderson, Producer, 60 Minutes • Glenn Reynolds, Instapundit.com and PajamasMedia.com
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3:00 - 3:45pm <i>Grand Ballroom B</i>	Policy Roundtables • Criminal Justice: Marc Levin, Director, Center for Effective Justice, Texas Public Policy Foundation • K-12 Education Reform: Kara Hornung Kerwin, Director of External Affairs, The Center for Education Reform • Truth in State Budgeting: Sheila Weinberg, Founder, Institute for Truth in Accounting • Property Rights: Christina Walsh, Director of Activism and Coalitions, Institute for Justice • Transportation: John A. Charles, Jr., President and CEO, Cascade Policy Institute
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3:00 - 4:00pm <i>Taft</i>	Money in the Mailbox: Building a State-Based Direct Mail Program For fundraisers - pre-registration required Moderator: Jess Yescalis, Development Consultant, Goldwater Institute • Eric Langborgh, ClearWord Communications • Jim Johnston, Director of Marketing, Mercatus Center • Holly Jackson, Director of External Relations, State Policy Network
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APPENDIX D



31ST ANNUAL RESOURCE BANK MEETING

Thursday, April 24, through Friday, April 25, 2008
Sheraton Atlanta Hotel











Recognizing Reforms and Reformers Who Make a Difference

~ Agenda ~

THURSDAY, APRIL 24, 2008

8:00 a.m.	EARLY REGISTRATION OPENS CONTINENTAL BREAKFAST SERVED	<i>Georgia Booth (Level 1)</i> <i>Outside Georgia 8-10 (Level 1)</i>
8:30 – 11:45 a.m.	PRE-CONFERENCE WORKSHOP ON DIRECT MAIL FUNDRAISING Kevin Gentry, Vice President, Charles G. Koch Charitable Foundation – <i>Host</i>	<i>Georgia 8–10 (Level 1)</i>
click to listen 	<i>Should I Start a Direct Mail Fundraising Program?</i> Shari Hanrahan, Vice President of Outreach, Texas Public Policy Foundation Roger Ream, President, The Fund for American Studies	
click to listen 	<i>How Do I Build My Direct Mail Program?</i> Jim Johnston, Director of Marketing, Mercatus Center at George Mason University Carsten Walter, Director, Membership Programs and Grant Development, The Heritage Foundation	
10:00 a.m.	REGISTRATION OPENS BOOKSTORE OPENS DISPLAY TABLES AREA OPENS	<i>Georgia Booth (Level 1)</i> <i>Georgia 7 (Level 1)</i> <i>Georgia Prefunction (Level 1)</i>
11:00 a.m.	WELCOME COFFEE <i>Hosted by Atlanta Committee for Heritage</i>	<i>North Tower Lobby (Level 1)</i>
12:00 – 1:30 p.m.	OPENING LUNCHEON Ernest Taylor, Chairman, Atlanta Committee for Heritage – <i>Welcome</i> Becky Norton Dunlop, Vice President, External Relations, The Heritage Foundation – <i>Introduction</i> Jonah Goldberg, Editor-at-Large, <i>National Review Online</i> and Author, <i>Liberal Fascism: The Secret History of the American Left from Mussolini to the Politics of Meaning</i>	<i>Capitol Ballroom (Level 1)</i>
click to watch 		
1:30 – 1:45 p.m.	BREAK AND BOOKSTORE BOOK SIGNING: Jonah Goldberg, <i>Liberal Fascism: The Secret History of the American Left from Mussolini to the Politics of Meaning</i>	<i>Georgia 7 (Level 1)</i> <i>Outside Georgia 7 (Level 1)</i>
click for info 		
1:45 – 3:00 p.m.	CONCURRENT SESSION I <i>Why Limit Government?</i> Tim Phillips, President, Americans for Prosperity and Americans for Prosperity Foundation – <i>Moderator</i> Carrie Lukas, Vice President for Policy and Economics, Independent Women’s Forum Johnny Munkhammar, Senior Fellow, European Enterprise Institute, Belgium, and Author, <i>The Guide to Reform: How Policymakers Can Pursue Real Change, Achieve Great Results, and Win Re-election</i> Grover Norquist, President, Americans for Tax Reform	<i>Atlanta Ballroom (Level 1)</i>
click to listen 		

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1:45 – 3:00 p.m.		CONCURRENT SESSION I (continued)	
click to learn		<i>Building a Movement of Ideas: Preserving Donor Intent</i> John Von Kannon, Vice President and Treasurer, The Heritage Foundation – <i>Moderator</i> Frederic Franssen, Ph.D., Executive Director, Center for Excellence in Higher Education Gisèle Huff, Executive Director, Jaquelin Hume Foundation Adam Meyerson, President, The Philanthropy Roundtable	<i>Georgia 8–11 (Level 1)</i>
3:00 – 3:15 p.m.		COFFEE BREAK	<i>North Tower Lobby (Level 1)</i>
click for info		BOOK SIGNING: Grover Norquist, <i>Leave Us Alone: Getting the Government's Hands Off Our Money, Our Guns, Our Lives</i>	<i>Outside Georgia 7 (Level 1)</i>
click for info		BOOK SIGNING: Johnny Munkhammar, <i>The Guide to Reform: How Policymakers Can Pursue Real Change, Achieve Great Results and Win Re-election</i>	<i>Outside Georgia 7 (Level 1)</i>
3:15 – 4:30 p.m.		CONCURRENT SESSION II	
click to learn		<i>Responding to the Climate Change Challenge</i> Becky Norton Dunlop, Vice President, External Relations, The Heritage Foundation – <i>Moderator</i> E. Calvin Beisner, Ph.D., Founder and National Spokesman, Cornwall Alliance for the Stewardship of Creation Alexandra Liddy Bourne, Vice President, Policy and Strategy and National Legislation Manager, The Heartland Institute Paul Chesser, Director, Climate Strategies Watch	<i>Atlanta Ballroom (Level 1)</i>
click to learn		<i>A Conservative Vision for a Just Society</i> Jennifer Marshall, Director, Domestic Policy Studies, The Heritage Foundation – <i>Moderator</i> Iain Duncan Smith, MP, Chairman, Centre for Social Justice, United Kingdom Greg Fleming, CEO, Maxim Institute, New Zealand Ryan Streeter, Ph.D., Vice President, Civic Enterprises, LLC	<i>Georgia 8–11 (Level 1)</i>
4:30 – 4:45 p.m.		BREAK AND BOOKSTORE	<i>Georgia 7 (Level 1)</i>
click for info		BOOK SIGNING: Iain Murray, <i>The Really Inconvenient Truths: Seven Environmental Catastrophes Liberals Don't Want You To Know About—Because They Helped Cause Them</i>	<i>Outside Georgia 7 (Level 1)</i>
4:45 – 6:00 p.m.		<i>Enhancing Your Effectiveness on the Web – A Google Tools Workshop</i> Conn Carroll, Assistant Director, Center for Media and Public Policy, The Heritage Foundation – <i>Host</i> Peter Greenberger, Team Manager, Elections & Issue Advocacy, Google, Inc. Ben Weisberg, Account Manager, Elections & Issue Advocacy, Google, Inc.	<i>Georgia 5–6 (Level 1)</i>
click to learn			
download slides			
6:00 p.m.		BOOKSTORE CLOSES	<i>Georgia 7 (Level 1)</i>
6:00 – 7:00 p.m.		RECEPTION	<i>Grand Ballroom Foyer (Level 3)</i>
7:00 – 8:45 p.m.		DINNER AND KRIEBLE LECTURE Phil Truluck, Executive Vice President, The Heritage Foundation – <i>Master of Ceremonies</i> Dan Oliver, Chairman of the Board, <i>National Review</i> – <i>Tribute to William F. Buckley</i> Rev. Robert A. Sirico, President, Acton Institute for the Study of Religion and Liberty	<i>Grand Ballroom (Level 3)</i>
click to learn			
8:45 – 9:30 p.m.		DESSERT RECEPTION	<i>Grand Ballroom Foyer (Level 3)</i>
9:30 – 11:00 p.m.		<i>Film Presentation: "The Singing Revolution"</i> James Tusty, Producer and Director, "The Singing Revolution"	<i>Grand Ballroom (Level 3)</i>
click for info			

FRIDAY, APRIL 25, 2008

7:00 – 8:30 a.m.	CONTINENTAL BREAKFAST BUFFET	<i>Capitol Ballroom (Level 1)</i>
7:30 – 8:45 a.m.	Film Presentation: "The Birth of Freedom" Jay Richards, Ph.D., Research Fellow and Director, Acton Media, Acton Institute for the Study of Religion and Liberty	<i>Capitol Ballroom (Level 1)</i>
8:45 a.m.	INTERNET CAFÉ OPENS	<i>Atlanta 5 (Level 1)</i>
9:00 a.m.	BOOKSTORE OPENS GOOGLE TUTORIAL SUITE OPENS	<i>Georgia 7 (Level 1)</i> <i>Atlanta 5 (Level 1)</i>
9:00 – 10:15 a.m.	CONCURRENT SESSION III	
click for info 	<i>A New Vision for Health Care Reform</i> Nina Owcharenko, Senior Policy Analyst, Center for Health Policy Studies, The Heritage Foundation – Moderator Tom Price, M.D., Member, United States House of Representatives (R-GA) John Shadegg, Member, United States House of Representatives (R-AZ)	<i>Georgia 3–5 (Level 1)</i>
click for info 	<i>Expanding Choice and Competition in Education – The Georgia Case Study</i> Dan Lips, Education Policy Analyst, The Heritage Foundation – Moderator David Casas, Member, Georgia House of Representatives Robert Enlow, Executive Director and COO, The Friedman Foundation for Educational Choice Scott Jensen, National Consultant of State Projects, Alliance for School Choice Jamie Self, Director of Government Affairs, Georgia Family Council	<i>Atlanta 1–4 (Level 1)</i>
10:15 – 10:30 a.m.	COFFEE BREAK	<i>North Tower Lobby (Level 1)</i>
click for info 	BOOK SIGNING: Kim R. Holmes, <i>Liberty's Best Hope: American Leadership for the 21st Century</i>	<i>Outside Georgia 7 (Level 1)</i>
10:30 – 11:45 a.m.	CONCURRENT SESSION IV	
click for info 	<i>Tools for Limiting Government</i> Alison Fraser, Director, Thomas A. Roe Institute for Economic Policy Studies, The Heritage Foundation – Moderator Tom Daxon, Economist, Oklahoma Council of Public Affairs, and Executive Director, Opportunity Oklahoma Jon Ham, Vice President for Communications, John Locke Foundation, and Publisher, <i>Carolina Journal</i> Edmund J. McMahon, Director, Empire Center for New York State Policy Peggy Venable, Texas Director, Americans for Prosperity	<i>Georgia 3–5 (Level 1)</i>
click for info 	<i>How Trade and Globalization Expand Freedom, Create Jobs, and Improve Lives</i> Ambassador Terry Miller, Director, Center for International Trade and Economics, The Heritage Foundation – Moderator Franklin Cudjoe, Executive Director, IMANI Center for Policy and Education, Ghana Daniel Griswold, Director, Center for Trade Policy Studies, Cato Institute Eddy Martínez, Executive Director, Center for Export and Investment, Dominican Republic	<i>Atlanta 1–4 (Level 1)</i>
11:45 a.m. – 12:00 p.m.	BREAK AND BOOKSTORE	<i>Georgia 7 (Level 1)</i>
12:00 p.m.	GOOGLE TUTORIAL SUITE CLOSES	<i>Atlanta 5 (Level 1)</i>

12:00 – 1:30 p.m.	CLOSING LUNCHEON Kim R. Holmes, Ph.D., Vice President, Foreign and Defense Policy Studies, and Director, The Kathryn and Shelby Cullom Davis Institute for International Studies, The Heritage Foundation – <i>Introduction</i> John O’Sullivan, Executive Editor, Radio Free Europe / Radio Liberty	<i>Capitol Ballroom (Level 1)</i>
click to watch 		
1:30 – 2:00 p.m.	BREAK AND BOOKSTORE	<i>Georgia 7 (Level 1)</i>
2:00 p.m.	BOOKSTORE CLOSES DISPLAY TABLES AREA CLOSES INTERNET CAFÉ CLOSES	<i>Georgia 7 (Level 1)</i> <i>Georgia Prefunction (Level 1)</i> <i>Atlanta 5 (Level 1)</i>
2:00 – 4:00 p.m.	BREAKOUT SESSIONS	
	<i>I – Advancing a Conservative Vision for a Just Society</i> Jennifer Marshall, Director, Domestic Policy Studies, The Heritage Foundation – <i>Moderator</i>	<i>Atlanta 1–2 (Level 1)</i>
	<i>II – Global Warming Strategy Session</i> Becky Norton Dunlop, Vice President, External Relations, The Heritage Foundation – <i>Moderator</i>	<i>Georgia 8–9 (Level 1)</i>
	<i>III – Education Roundtable</i> Dan Lips, Education Policy Analyst, The Heritage Foundation – <i>Moderator</i>	<i>Atlanta 3–4 (Level 1)</i>
	<i>IV – Development Workshop – Major Grants Fundraising</i> Kevin Gentry, Vice President, Charles G. Koch Charitable Foundation – <i>Moderator</i>	<i>Georgia 10–12 (Level 1)</i>
click to view 	<i>Why Do Donors Give?</i> Beverly Danielson, Trustee, Capital Research Center John Von Kannon, Vice President and Treasurer, The Heritage Foundation	
click to view 	<i>Helping Philanthropists to Achieve Great and Life-Changing Things</i> Calvin Edwards, Founder & CEO, Calvin Edwards & Company Tim Phillips, President, Americans for Prosperity and Americans for Prosperity Foundation	

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CURRICULUM VITAE

Ann C. Fitzgerald

Education:

M.A. in Philanthropic Studies, Indiana University, 2011

Dissertation: Do Nonprofit Networks Contribute to the Effectiveness Of State-Level Free-Market Think Tanks?

Advisor: Dr. Leslie Lenkowsky

B.A. in French Literature, The Catholic University of America, 1988

Professional Experience:

2006—Present, President, A.C. Fitzgerald & Associates, LLC, Arlington, VA

Founded a national consulting firm that provides business solutions for charities and other nonprofit organizations. Its principal goal is to help client organizations achieve their vision by developing strategies to increase income and effectiveness.

1994—2006, The Heritage Foundation, Washington, DC

Director of Development, 2000—2006

Promoted to direct \$32 million annual fundraising operation for prominent public policy research foundation. Oversaw a team of 22 employees responsible for major gifts, direct marketing and planned gift programs. Planned, implemented, and managed print and online donor communications.

- Established integrated marketing and operational programs, utilizing new technologies and innovative staff training that reduced attrition and helped increase overall income by 20%.
- Conceptualized and realized strategic plan that established short- and long-term financial and organizational objectives.
- Built strong corporate relations program that increased income by over 18% annually.

Director of Marketing and Publishing Services, 1996—2000

Promoted to reengineer publishing operation. Directed editing, production, marketing, and distribution of print and electronic products. Managed a team of 20 employees.

- Elevated standards of quality and created brand image for foundation's information products.
- Pioneered transition to electronic workflow, reducing errors and downtime.
- Consolidated and streamlined operations to increase productivity by 400% at a savings of over \$300,000 annually.

Manager of Online Marketing, 1994—1996

Successfully launched the organization's first Internet site. Developed and implemented marketing plans for online products. Created online content and communication materials. Managed media relations, gave numerous radio interviews and speeches.

1989—1993, The Bureau of National Affairs, Inc. (BNA), Washington, DC

District Sales Representative, 1993—1994

Assistant to the Vice President of Sales and Marketing, 1989—1993

Hired to support the sales and marketing efforts of 200—person sales force. Promoted to outside sales to sell full line of BNA's legal and regulatory information services in human resources, law, tax, environment, safety and health; increased sales by 15% in territory.

Public Service:

2009—Present, Member, Advisory Board, Talent Market

2009—Present, President, Carlyn Place Homeowners Association

Professional Societies:

Association for Research on Nonprofit Organizations and Voluntary Action

Association of Fundraising Professionals

Selected Publications:

“Be Compelling to Prospective Donors: How to Write a Case for Support” in the Heritage Foundation's *Insider*, Summer 2010 edition.

“Creating the Right Funding Mix for Long-Term Sustainability” in *SPN News*, March/April 2008 edition.

“Making Direct Mail Work for You” in the Heritage Foundation's *Insider*, Winter 2008 edition.

Selected Presentations:

- November 10, 2010, “A Global Approach to Building Relationships and Engaging Donors.” Atlas Economic Research Institute's Think Tank 101 Program, Washington, DC.
- October 27, 2010, “Writing a Fundraising Plan.” The Leadership Institute Fundraising Seminar, Arlington, VA.
- September 13, 2010, “Executing a Fundraising Plan Day-by-Day” and “Fundraising Against the Tide.” State Policy Network Annual Meeting, Cleveland, OH.
- July 27, 2010, “Writing a Fundraising Plan.” The Leadership Institute's Fundraising Seminar, Arlington, VA.

- April 22, 2010, “Grantsmanship for Fun and Profit.” The Legal Strategy Forum at The Heritage Foundation’s Annual Resource Bank Meeting, Miami, FL.
- March 30—April 2, 2010, “Budgeting for Long-Term Success.” The Leadership Institute’s International Fundraising School, Crowthorne, England.
- November 10, 2009, “International Fundraising.” The Atlas Economic Research Institute’s Think Tank 101 Program, Washington, DC.
- November 3, 2009, “Doing it Better: Building a Fundraising Team and Culture.” State Policy Network Annual Meeting, Asheville, NC.
- August 13, 2009, “International Fundraising.” Atlas Economic Research Institute’s Think Tank MBA Program, Washington, DC.
- April 21, May 13, July 1, 2009, “Success in Survival Times.” Pal-tech, Ft. Lauderdale, Portland, OR, and St. Louis, MO.
- April 16, 2009 “Organizing a Development Office.” The Leadership Institute’s High Dollar Direct Mail School, Arlington, VA.
- June 11, 2009, “Success in Survival Times.” National Taxpayers Union Conference, Arlington, VA.
- September 11, 2008, “Developing a Fundraising Plan” State Policy Network’s Annual Conference, Phoenix, AZ.
- September 17, 2008, “Organizing a Development Office.” The Leadership Institute’s Development Seminars, Arlington, VA.