

The Foundation Review

Volume 3
Issue 4 *Open Access*

2011

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Recommended Citation

Hamilton, C. H. (2011). A Hedgehog Moment: The Roles and Pitfalls of Strategic Philanthropy for Family Foundations and Donors: Book Review. *The Foundation Review*, 3(4). <https://doi.org/10.4087/FOUNDATIONREVIEW-D-11-00021>

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A Hedgehog Moment: The Roles and Pitfalls of Strategic Philanthropy for Family Foundations and Donors

Charles H. Hamilton, M.B.A., Bessemer Trust

Introduction

In 1930, Frederick P. Keppel published *The Foundation*, one of the earliest books on foundations. Keppel, who was president of the Carnegie Corporation from 1922-1941, noted that foundations were a distinctly 20th-century phenomenon, and “only seven of any importance having carried over from the nineteenth” (1930, p. 17). By 1930, he estimated that there were 200 foundations with assets of almost \$1 billion, or about \$13 billion in current dollars. Since then the growth of foundations has been phenomenal. By 2010, nearly 76,000 foundations had assets of \$565 billion and annual giving of nearly \$46 billion (Foundation Center, 2011). Private philanthropy continues to be very robust, even in the recent economic downturn, as donors, families, and, especially, baby boomers make significant charitable plans.

However, the growing quantity of giving has not been matched by improved quality. This is the perennial challenge that afflicts philanthropy, what Keppel described as “the truly difficult task of properly distributing large funds” (1930, p. 34). That growth in the quantity of new philanthropy and the search for more effective philanthropy has now produced a “significant moment in the marketization of philanthropy” (L Bernholz, 2008). A recent outpouring of books by foundation officials, consultants, and academics has broadly emphasized the idea that “strategic philanthropy” in some form promises significant improvements. With these books, then, do donors, family foundations, and philanthropy generally

have new usable knowledge to meet the challenge of quality grantmaking?

Strategic Philanthropy as ‘The Big Idea’

Isaiah Berlin famously and lightheartedly made the distinction between the hedgehog and the fox, quoting Archilochus: “The fox knows many things, but the hedgehog knows one big thing” (Berlin, 1993). We seem to be in the midst of a “hedgehog moment,” where strategic philanthropy envelops the way to philanthropic success.

On the one hand, this is different from the approach of the philanthropic “fox” that traditionally sees many complex causes for philanthropic underperformance and success. Addressing myriad small, marginal improvements may in fact contribute most to success and failure – such things as clarity about the values and goals of giving; sensitivity to cause and effect and unintended consequences; attention to tactics, follow-through, and day-to-day challenges of administration and implementation; balancing multiple philanthropic interests; muddling through family dynamics; and then honing the soft skills of good manners, judgment, humility, and listening.

On the other hand, the current “hedgehog” sees in strategic philanthropy the way to engage in successful philanthropy. This trend was sparked in 1999 when Michael Porter and Mark Kramer reframed the challenge of improving the quality of giving as one that “requires a real strategy.” They go on to regret that “the word ‘strategy’ has

The Books

The Foundation: A Great American Secret, Joel L. Fleishman (Public Affairs, 2007, 334 pages).

Fleishman, a professor of law and public policy at Duke University, previously served as president of the Atlantic Philanthropies Service Co., the U.S. program staff of Atlantic Philanthropies. *The Foundation* is a strong moral and practical plea that "more should be expected from foundations," and offers ways that might be accomplished. Two chapters are good on foundation success and failure: Chapter 8, on successful initiatives, and Chapter 12, on foundation failures, chosen "from among several hundred that were suggested to me" (p. 191). These become useful background for chapters on strategy and achieving impact, which are straightforward and useful. *The Foundation* was not intended as a history of foundations – which is unfortunate, since the other books reviewed here are also limited by a lack of historical context. A companion volume – *Casebook for 'The Foundation,'* by Fleishman, J. Scott Kohler, and Steven Schindler (Public Affairs, 2007) contains 100 case studies of successes from wealthier foundations between 1901 and 2002. Sadly, too many of the cases read like marketing pieces from foundation communication departments, an impression reinforced by the several cases with which I am familiar. Far more valuable would be a candid casebook of foundation failures and successes, with some discussion about why some foundations and program strategies are successes and others are failures.

Money Well Spent: A Strategic Plan for Smart Philanthropy, Paul Brest and Hal Harvey (Bloomberg Press, 2008, 280 pages).

Brest is president of the William and Flora Hewlett Foundation and former dean of Stanford University Law School; Harvey is president of ClimateWorks Foundation. The authors caution that strategic philanthropy is not easy and only for a small number of philanthropists, because it "takes a great deal of focus, time, energy, and consultation" (p. xiv). This is an important caution echoed by *Do More Than Give* and *Give Smart*. Nonetheless, the first part, "The Framework of Strategic Philanthropy," would be valuable reading for family foundations or a donor. Just don't be lulled into assuming that strategic philanthropy is the major driver of philanthropic success. The authors are thoughtful foundation executives who know that "the core activity of philanthropy is grantmaking" (p. 2). The two chapters exploring that crucial relationship are particularly useful. They are welcome antidotes to the all-too-common conceits that grantees are not all that important or competent and that funders know better and are responsible for most philanthropic successes. Because these broader discussions of grantmaking go beyond the more narrowly strategic, I found this is the best general book on how "to design strategies to bring about results" (p. x).

The Essence of Strategic Giving: A Practical Guide for Donors and Fundraisers, Peter Frumkin (University of Chicago Press, 2010, 171 pages).

Frumkin is professor of public affairs at the Lyndon B. Johnson School of Public Affairs and director of the RGK Center for Philanthropy and Community Service at the University of Texas at Austin. This short book is much more focused than the author's unwieldy, 435-page *Strategic Giving: The Art and Science of Philanthropy* (2006), which missed its mark as a clear road map for donors. One of Frumkin's greatest contributions is his emphasis on the "expressive" dimension of giving. The values, passions, diversity, and goals that donors and families bring to philanthropy and civil society have their own deep legitimacy. His presentation of strategy is straightforward and similar to that in the other books. Donors are presented with a "universal model" to achieve fit and coherence in their philanthropy by addressing five key challenges: express the public value desired, define a grantmaking methodology, find a giving style, settle on a time frame, and select the right giving vehicle. The use of various academic models to explain these challenges will be mostly a distraction for many family-foundation readers. However, the author's examples of philanthropic success and failure are relevant and convincing, in part because they are often about donors and smaller projects (for instance, he contrasts the travails of the Everett Foundation's work with the New York City Central Park Zoo with the successes of Aaron and Irene Diamond in seeking a cure for AIDS).

Do More Than Give: The Six Practices of Donors Who Change the World, Leslie R. Crutchfield, John V. Kania, and Mark R. Kramer (Jossey-Bass, 2011, 238 pages).

The authors work at FSG, a "social impact" consulting firm founded in 1999, at the same time Mark Kramer and Michael Porter started the Center for Effective Philanthropy. The authors use the framework Kramer developed in his article "Catalytic Philanthropy" (*Stanford Social Innovation Review*, Fall 2009), though they avoid the notion that catalytic philanthropy is a "new" approach. The book is an infectious and informed call for social change, imbued with a sense of "urgency... to make faster progress" (p. vii). They use the same basic approach as *Forces for Good*, written by Crutchfield and Heather Grant in 2008, of identifying six practices for donors interested in impacting social change – in this case, advocacy, tapping the power of business, forging nonprofit peer networks, empowering the people, leading adaptively, and building a learning organization through measurement and adjustments. After a chapter on what it takes to commit to a cause, there is a chapter devoted to each of these six practices. The chapters on peer networks and leading adaptively would be particularly useful to family donors. However, the authors' enthusiasms can easily and unintentionally drown out important cautions throughout in the book. Readers could easily take away precisely the bad habits that have always hampered effective philanthropy: thinking that change is simple, that one has the answer, and that asserting one's solution is mostly all it takes. Read carefully for the nuance, though, and this is a valuable book.

Give Smart: Philanthropy That Gets Results, Thomas J. Tierney and Joel L. Fleishman (Public Affairs, 2011, 245 pages).

Tierney was chief executive officer of Bain & Co. when, in 1999, he co-founded Bridgespan, a consulting firm helping nonprofits and philanthropy. His co-author is the author of *The Foundation: A Great American Secret*. The book is written in a popular style and individual parts will be helpful to new family donors or experienced philanthropists, though it is most useful for the small number of philanthropists who make the time commitment and have a laser-like focus on an issue. The authors rightly summarize "philanthropy's terrible truths": that "philanthropy's natural state is underperformance" (p. 2); "where there are no natural predators, philanthropy is inclined to persist, but not to excel" (p. 5); and "unless you demand outstanding performance from yourself, no one else will demand it of you" (p. 82). Rather than lay out a "universal model for strategic giving" as Frumkin does, the authors take a gentler approach by asking six questions: What are my values and beliefs? What is "success" and how can it be achieved? What am I accountable for? What will it take to get the job done? How do I work with grantees? Am I getting better? Donors themselves would be well served to answer each of these good questions periodically. And yet, several of the questions appear too focused on the donor, which could encourage donor hubris. An additional question might help, even though it somewhat overlaps the others – something like, "Who is achieving results and why?" Unfortunately, the many examples the authors tout of what they see as strategic successes are much too facile. Ultimately, the basic premise of the book, namely "philanthropists making smarter decisions achieve better results" (p. 200), seems rather tautological.

been so overused in the foundation world that it has become almost meaningless. 'Strategic giving' now refers to almost any grant made with some purpose in mind" (Porter & Kramer, 1999, p. 125). More than simply strategic grantmaking or narrow strategic planning, "strategic philanthropy" comes to embrace the whole organization and everything it does, focused on achieving impact.

All the books under review build on this broader idea. They have largely overlapping views of what it takes to be strategic. Basically, once a goal and values are chosen (the "expressive" element that

Peter Frumkin (2010) emphasizes and that several of the books also mention but all too briefly), strategic philanthropy develops as a flexible plan of action toward a goal with clear ways to assess whether the means are reaching that end. Make no doubt about it: Thinking strategically in this way is something donors and family philanthropies should do. Wanting to "do good" and feeling good about it simply isn't good enough. If there are coherence and alignment of all the elements of one's goals and strategy, then the chances for impact do increase.

A problem is that strategic philanthropy – or “catalytic philanthropy,” to use the term in Leslie Crutchfield’s book – has gone from being a useful organizing principle to taking on a life of its own where it can mean everything and nothing (that terrible fate of buzzwords). The exuberance and urgency in these books market the dichotomy between traditional philanthropy and the new strategic philanthropy. Crutchfield, for instance, describes the “traditional mindset” as, “I pick grantees, they solve the problem, and at the end of the year they send me a final report and I feel good” (Crutchfield, Kania, & Kramer, 2011, p. 115). This may be bad philanthropy, but it is not traditional philanthropy. Nor is strategic philanthropy new. The worry about ineffective philanthropy has always been with us. Keppel’s concern and hope in 1930 shadows us still: “Sometimes I find it hard to justify many of the grants made by the foundation for which I am in part responsible or any of the others.” And yet, “I am very hopeful that our activities are measurably moving toward a more logical basis” (Keppel, p. 33). Such a false dichotomy not only does a disservice to fact and history; much more important, it tends to lend an unjustified Teflon veneer to strategic philanthropy as the new, obvious, and assumed high-impact solution.

Thus, the buyer should beware. The humorous and barbed warning of Tony Proscio (2000) captures the problem well, that strategy has been taken up “with a giddiness of a soldier on leave. ... [I]t has developed an aura of indispensability and universal relevance that grows wearisome even when it is not really out-of-place. ... [T]he use of ‘strategy’ needs to be treated with the greatest distrust” (pp. 20, 21).¹

The five books reviewed here (several of them supported – directly or indirectly – by foundations) provide a window onto the current state of strategic philanthropy as the answer for improving philanthropy. Donors and family foundations will learn a lot from these books. Being strategic

is crucial for good grantmaking. At the same time, there are several common themes that suggest caution in seeing strategic philanthropy as “the big idea” that will resolve the problem of philanthropic underperformance.

Does Strategy Drive Success?

Thomas J. Tierney and the other authors are right that there is a perennial state of philanthropic underperformance. It should deeply worry donors and family foundations that their hard-earned dollars can so easily be wasted. We know, or at least feel, that so much giving is ineffective or venal. It is maddening that, even when DARE has been shown to be ineffective, it brought in more than \$6.5 million in revenue in 2009. But knowing what is effective and isn’t effective is very difficult. Joel L. Fleishman (2007) gives the example of Living Cities as a multifoundation initiative that has been “unsuccessful on its own terms” (p. 210). And yet, the *Casebook for ‘The Foundation’* presents it as a success, as did a former staffer in a recent conversation. The Annenberg Education Challenge is widely viewed as “one of the major failures in foundation history” (Fleishman, 2007, p. 196). But *Give Smart: Philanthropy That Gets Results* concludes that “it is hard to label the Annenberg Challenge a failure” (Tierney & Fleishman, 2011, p. 78). If it were not a failure, how can anything be described as a success or a failure?

As Fleishman’s book and *Casebook* make clear, a large share of foundation funding comes from the largest foundations that have a strategic focus on promoting large-scale, lasting social change. It is precisely those foundations that have the staff to “do it right.” In fact, most examples of wasteful and underperforming philanthropy were proclaimed as strategic initiatives by donors and foundations. Strategic philanthropy appears to have a high failure rate, too, then. Something is wrong that isn’t being addressed in these books. Recently, Paul Connolly (2011) wrote an article calling for more “humanism” and breadth in approaching effective philanthropy. He noted several cases of large philanthropies that clearly thought they were pursuing their goals through strategic philanthropy, but without much success – for instance, the philanthropic arm of Google,

¹ Proscio’s *In Other Words: A Plea for Plain Speaking in Foundations* (2000) is one of three short, humorous, and painfully pertinent books published by the Edna McConnell Clark Foundation. The others are *Bad Words for Good* (2001) and *When Words Fail* (2005).

the Northwest Area Foundation, and the California Wellness Foundation. A new strategy in these and other cases is always the next step and rightly so, but these books generally don't help us see what make some strategies good and others not so much.

These books generally assume strategy does drive success. They also tend to be overly generous in their claims of philanthropic success (except Frumkin). Indeed, it is largely unclear the extent to which success can be attributed to strategic philanthropy or to many other factors. This tendency for overblown attributions of success compromises the claims for strategic philanthropy. From these books and the ancillary writing on strategic philanthropy, we simply don't know whether or how strategic philanthropy drives philanthropic success and impact.

[As an aside, perhaps one of the most important services a new donor could provide for the field would be to start a foundation solely focused on publishing independent, broad-based evaluation research on philanthropic and nonprofit initiatives. There needs to be much more third-party discourse on what has impact, what doesn't, and why.]

Some commentators question strategic philanthropy in a different way. They have decried the invasion of strategy into philanthropy as snatching the soul and heart of philanthropy. Bruce Sievers is among the most articulate; he finds the intrusion of a business model under guise of strategic philanthropy as invasive and unjustified.² Not only is it contrary to the values and sustenance of civil society, but it encourages hyper-rationalism and linear thinking, overly directive actions, and reliance on short-term solutions and measures. This is part of the broader concern Connolly has expressed, too. Donors should worry about this; it certainly does happen. But this concern is misplaced. Having a strategy is simply a way to think about one's philanthropic values

² *If Pigs Had Wings: The Appeals and Limits of Venture Philanthropy*, Waldemar A. Nielsen Issues in Philanthropy Seminar Series, Georgetown University, November 16, 2001, and "Philanthropy's Blindspots" in *Just Money*, Peter Karoff, ed., TPI Editions, 2004.

and goals and about how to reach one's achievable objectives. This is crucial for philanthropy to be effective. All of the authors under review would agree that the expressive element of philanthropy is first, and that it can't be reached without a compelling and coherent overall strategy.

Frumkin has been quite thoughtful about this need for greater breadth in thinking about philanthropic success. Just before *The Essence of Strategic Giving* was published, he worried that the case for the rationalistic and technocratic nature of strategic giving (including his own) does not actually explain much about philanthropic impact and effectiveness (Frumkin, 2010). That has certainly been my experience over 30 years in philanthropy, as both a philanthropist and as a small donor. Strategic philanthropy is but one element of success. Readers should balance an appreciation of how it can help donors and philanthropists devise a clear "road map" with skepticism about the big claims for the success of strategic philanthropy. Donors and philanthropists are best advised to approach philanthropy as foxes: seeking to learn the many things that contribute to philanthropic success.

Unintended Consequences

Readers also need to be wary about how they read these books. Simply put, too quick a reading might actually reinforce "bad" philanthropy and introduce it to a new generation of donors and philanthropists eager to have a quick impact.

One of the most pernicious and prevalent characteristics of modern philanthropy is hubris. *Money Well Spent* and *Give Smart* are particularly clear about this. All of the books are full of warnings and caveats about strategic philanthropy. They generally acknowledge that they are writing for a small segment of the audience of donors and philanthropists and that doing strategic philanthropy well takes a remarkable amount of time, focus, care, and commitment. But their general enthusiasm for marketing strategic philanthropy as "the big idea" may be a toxic combination for readers looking for easy take-aways. Indeed, foundation trustees, executive directors, and program officers are looking for the same thing and many will likely come away embracing the big idea of stra-

tegic philanthropy and figuring the many caveats don't apply to their situation.

As one instance, consider the use of adaptive leadership as a key concept in *Do More Than Give*. The phrase tries to capture the idea that problems are complex, that they are rarely fully known, that solutions must be discovered by engaging stakeholders, and that leadership requires being assertive but not directive. This is right, important, and difficult. Nonetheless, many careless readers will see in this discussion a shortcut to effectiveness.

Do More Than Give makes much of a distinction between "technical" and "adaptive" problems. In fact, the technical problems listed (such as "funding scholarships") are not problems at all but projects or means to address a more complex problem. But, the authors claim, "technical problems are well defined. Their solutions are known and people or groups with adequate expertise and organizational capacity can solve them" (Crutchfield, Kania, & Kramer, 2011, p. 150); thus, their "simple technical problems tend to resolve themselves quickly with the application of money and expertise" (p. 156). I have seen too many new donors and experienced program officers easily interpret their particular pet projects and solutions as such simple-to-solve technical problems.

Several of the books also leave the impression that foundation and donor initiatives are to be preferred over close work with nonprofits. For instance, the claim that "most nonprofit organizations today aren't equipped to provide the kind of solutions this complex world requires" (Crutchfield, Kania, & Kramer, 2011, p. 7) is often true. But the point could lead donors and foundations to believe that *they* have the necessary skills and can ignore nonprofit organizations and their expertise. I suspect that strong and successful entrepreneurs and newly wealthy donors might be particularly susceptible to this attitude that they know what is best. My experience is that foundations are usually even less likely to be so "equipped" and more likely to believe they have the answer. The call for donors "to orchestrate – subtly but persistently – the activities of key players to advance their causes" (Crutchfield,

Kania, & Kramer, 2011, p. 14) can further stoke the hubris that many philanthropists and donors may already have about whatever pet projects they have.

None of this is what the authors intend but there is enough of this kind of thing in several of the books to encourage precisely this kind of hubris. Readers should read with care and remember that humility and the old saw of "first, do no harm" are the first line of defense against ineffective and wasteful philanthropy.

Don't Forget About Implementing

My experience and that of many philanthropists is that implementation may be as important as having a strategy. In so many ways it is more difficult. As the former chief executive officer of the Robert Wood Johnson Foundation succinctly put it: "execution trumps strategy"; "... a preoccupation with strategy all too often causes us to gloss over the equally important decisions about the way that a goal – or an individual program – will be implemented" (Schroeder, 2004, p. 184). The ability to see a strategy through its implementation is rare for many reasons besides its pedestrian reputation. It takes time; one must suffer through many different kinds of staff changes; and it requires a variety of serious skills (hard and soft) that simply are not common. Strategic philanthropy is ideally broader and more encompassing than mere "strategy," as Porter and Kramer pointed out in 1999. But there is a tendency for many donors and philanthropists who are so wonderfully driven by a cause and the desire for results to stay in the stratosphere of their strategy and avoid the long-term commitment and messiness of following through with implementation. One can't have one without the other.

Usable Knowledge: What Donors and Families Need

Is this all usable knowledge? Some donors and family philanthropies will do their philanthropy as the big idea these books discuss, and with the great care needed. That will add to the effectiveness and variety of philanthropy. Others, seeking easy answers, will wrongly latch onto some of the points, untethered to very important cautions and nuances. They may come away thinking that sim-

ply stating a strategy is enough. This is not what any of the authors intend. I have seen, however, such limited take-aways drive philanthropic values into ineffectiveness. Doing so builds the kind of hubris that stultifies philanthropy and gives it the bad name it often deserves. If these books are read with particular attention to the limitations of strategic philanthropy, any donor and all family foundations will learn more about the promises and pitfalls of philanthropy.

The vast majority of donors and family philanthropies, however, won't severely focus their interests and then do all of the things these books see as necessary for truly effective strategic philanthropy. Most of the authors acknowledge this. Most philanthropists are engaged with several causes and they have limited time to spend on philanthropy. For those, marginal improvements and small changes in how things are done will not only increase the enjoyment and effectiveness of giving, but also do more to improve the chances for success. For instance, most donors and foundations rely on grantees and give money and work through nonprofits. It may well be that doing "humble philanthropy" very well, as William Schambra (2009) calls it, is especially important right now: "...what foundations do best and most reliably is simply to make grants to worthwhile nonprofit organizations. This may not be as glitzy and sophisticated as attempting to harness and ride whirlwind social forces like masters of the universe" (p. 40).

Thus, one of the keys to philanthropic effectiveness and the health of our civil society is to learn all the skills associated with the difficult art of assessing potential grantees well: make careful general operating support grants, support nonprofits and help staff become better at it while also holding them accountable, as well as listen carefully to them and a wide variety of experts. We need to be clear about measures for success, assess interim benchmarks, and be flexible enough to change if the strategy isn't working.

The philanthropic "fox" will attend to the complex task of strategy, but only within the context of a much broader perspective. Of particular impor-

tance are the difficult-to-learn "soft skills" of philanthropy. They may provide better philanthropic dividends over time than placing too much reliance on strategic philanthropy, and being seduced by some of the unintended consequences that go with betting on "one big thing." They are the skills of

judging the capacity, character, resilience, intelligence, and resourcefulness of the people who seek philanthropic funds. This is the kind of ill-defined and untheorized work that comes down to judgment and gut assessment ... and explains a lot more of the achieved social impact than anyone wants to admit (Frumkin, 2010).

In sum, each of these books makes distinctive and overlapping contributions to the field, focusing on strategic philanthropy. Seeing success as possible through this "one big thing," though, encourages hubris and does a disservice to the complexity of philanthropy. The real solutions to philanthropic underperformance are myriad. Perhaps the most usable knowledge for donors and families, as well as experienced philanthropists, is to include careful strategic considerations in your philanthropy and to attend to the many "small," incremental, and productive ways to increase effectiveness that probably drive philanthropic success the most.

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