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EXECUTIVE SUMMARIES



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RESULTS

12 The Quest for Quality: Lessons From a Certification Pilot Project for College Access Providers

Tania Jarosewich, Ph.D., Censeo Group; and Nushina Mir, Ph.D., The Lumina Foundation for Education

The Lumina Foundation reports on a pilot test of a certification program for college access services. The project was implemented in two states with different results. Many applicants for certification felt that the self-assessment improved their work and could be more beneficial if there were tangible rewards for achieving certification (e.g., prestige and funding). Funders considering supporting the development of certification of nonprofits should give careful attention to what organization should be the lead and to the scoring rubric. Including representatives of those who will apply for certification is critical.

doi: 10.4087/FOUNDATIONREVIEW-D-10-00011

TOOLS

25 The Real-Time Evaluation Memo: A Tool for Enabling Evaluative Thinking and Learning in Foundations and Nonprofits

Melanie Hwalek, Ph.D., SPEC Associates; and Mary Grcich Williams, M.A., The Lumina Foundation for Education

The authors report on experience using quarterly data-based feedback memos rather than a traditional evaluation report. Memo topics included stakeholder feedback on RFP's, assumptions uncovered during planning meetings, and criteria for key decisions. These memos can be highly useful in the developmental stage of complex initiatives, but require skilled evaluators who can bring both data and expert synthesis. The foundation must have a learning culture that provided time to reflect, and the balance between rigor and timeliness must be managed.

doi: 10.4087/FOUNDATIONREVIEW-D-10-00024

36 Evaluative Tools for Articulating and Monitoring Foundation Strategy

Helen Davis Picher, M.P.P., and Sandra Yetman Adams, M.S.W., The William Penn Foundation

While foundation leadership and staff value strategy and foundations largely perceive

themselves as strategic, they often struggle to articulate, implement, and track strategy. The William Penn Foundation has developed a collection of tools to articulate and assess its progress toward strategic goals. The tools provide structured formats for organizing information, but are used flexibly. The speed and breadth of adoption of each tool varies and is often related to the ability to communicate and demonstrate the intended benefits. The tools are labor-intensive to use, making sustainability a concern.

doi: [10.4087/FOUNDATIONREVIEW-D-10-00014](https://doi.org/10.4087/FOUNDATIONREVIEW-D-10-00014)

SECTOR

52 Beyond the Veneer of Strategic Philanthropy

Patricia Patrizi, M.S.S., Patrizi Associates; and Elizabeth Heid Thompson, B.A., Independent Consultant

“Strategic philanthropy” has become a dominant theme among foundations in the past few decades. Many foundations have developed strategic plans, but few have made the internal changes necessary to actually behave strategically. In order to get beyond the veneer of strategic philanthropy, foundation leaders need to be clearer about their own role in creating change, develop the strategic capacities to do so, and then apply those capacities, learn from them, and improve them over time.

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61 Embedded Foundations: Advancing Community Change and Empowerment

Paula Allen-Meares, Ph.D., University of Illinois at Chicago; Larry Gant, Ph.D., Trina Shanks, Ph.D., and Leslie Hollingsworth, Ph.D., University of Michigan

Embedded funders are foundations that have made long-term commitments to the communities in which they are located or work. Historically, foundations have funded community development work, with the funding strategies often responding to changes in government funding and policies. Political conditions, the increasing divide between rich and poor, inaccessibility of education, lack of housing, and continued segregation and racial discrimination are issues that need be addressed concurrently and resources need to be drawn from a variety of sources, particularly the neighborhoods themselves. This complexity has created an impetus for embedded philanthropy. Embedded funders work participatively with the community and frame evaluations in less theoretical, more actionable ways.

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REFLECTIVE PRACTICE

79 Beyond the Grant: How the W. K. Kellogg Foundation Went Beyond Grantmaking to Contribute to a Major Early Childhood Initiative

Stephen Greeley, M.S., and Beth Greeley, M.S., DCA, Inc.

The W. K. Kellogg Foundation’s SPARK initiative sought to link the pre-kindergarten and school worlds as a way to position vulnerable children for greater success in the early grades. The initiative was also the foundation’s first attempt at a large scale initiative with an explicit changemaker role. To create change, a foundation must articulate – and commit to – a point of view about how change can occur. A foundation that intends to

create change must be prepared to take responsibility for results and create the internal structures that promote accountability and collaboration. The nature of the SPARK effort called for abandoning the silos of portfolio management and developing a new collaborative approach. [doi: 10.4087/FOUNDATIONREVIEW-D-10-00001](https://doi.org/10.4087/FOUNDATIONREVIEW-D-10-00001)

94 Is the Policy Win All? A Framework for Effective Social-Justice Advocacy

Barbara Klugman, Ph.D., Independent Consultant

This article offers a theory-of-change framework to help those engaged in social-justice advocacy to reflect on whether social-justice values are being retained in the process. A reproductive rights effort in South Africa provides an example of how social justice values can be lost in the advocacy process. The failure to sustain work on the ground pointed to the need to maintain a base of support even after a policy victory. The grassroots advocacy infrastructure must be maintained and strategies revisited to respond to changes in the social and political contexts. One of the critical social-justice values that supports the establishment and maintenance of alliances is collaboration, which must continue to be nurtured after the advocacy campaign. [doi: 10.4087/FOUNDATIONREVIEW-D-10-00017](https://doi.org/10.4087/FOUNDATIONREVIEW-D-10-00017)



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