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RESULTS

06 The Impact Grants Initiative: Community-Participatory Grantmaking Modeled on Venture Philanthropy

Adin C. Miller, M.P.A., Elisa Gollub, Ph.D., Ilana Kaufman, M.A., and Adina Danzig Epelman, M.A., Jewish Community Federation and Endowment Fund

Building on the concepts of venture philanthropy, the Jewish Community Federation and Endowment Fund launched the Impact Grants Initiative, a model that offers high engagement opportunities for donors and identifies high-performing nonprofits. This article describes how the JCF staff and community leaders created this new tactic to harness people's time and talents, and to attract younger donors interested in participating in meaningful grantmaking. Funders looking to heighten community participation in grantmaking efforts are encouraged to consider the approach.

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22 Ripple Effects of Process Change

Rebekah Usatin, M.P.A., Nancy Herzog, M.A., and Myriam Fizazi-Hawkins, M.A., National Endowment for Democracy

Decisions to change processes in one area have the potential to cause ripples throughout the entire grantmaking process, impacting both donor and grantee. This article describes how the National Endowment for Democracy began a change in its grantee-evaluation process that affected how grants were recommended for renewal. What resulted was a shift from requiring grantees to self-evaluate projects at the conclusion of each project to evaluating the cumulative impact of grants on their longer-term objectives over the course of several grants.

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TOOLS

36 Using a Priority Grid as a Tool for Shaping Strategy and Building Impact

Lori Fuller, M.S.W., M.B.A., Kate B. Reynolds Charitable Trust

Once a foundation chooses a strategy, how can it put that strategy into everyday practice? This article describes the priority grid – an analytic tool to assess grant proposals – and how it has fundamentally changed and improved the work of the Kate B. Reynolds Charitable Trust. Developed by the Trust, the priority grid focuses staff attention on key strategic elements.

TOOLS

Applications have increased in quality and alignment with foundation strategy, and staff recommendations to approve or decline applications have fallen more in line with the grid.

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48 Climbing the Mountain: An Approach to Planning and Evaluating Public-Policy Advocacy

Sam Gill, M.Phil., and Tom Freedman, J.D., Freedman Consulting LLC

One challenge to the rise of outcome-oriented philanthropy is the question of how most effectively to plan, support, and evaluate public-policy advocacy. This article proposes a new methodology designed around a series of stages, each with a different set of strategic planning and assessment requirements. This approach urges a mixture of targeted quantitative and qualitative insights and is based on the authors' direct experience working with both policy processes and a wide range of foundations and nonprofits that have invested in public-policy advocacy.

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60 Financial Analysis for Measuring and Comparing Risk in Grantmaking Portfolios

Shena Ashley, Ph.D., Syracuse University, and Lewis Faulk, Ph.D., American University

Managing risk is one of the key functions in philanthropic grantmaking. This article describes a tool to evaluate the levels of risk that foundations maintain through their grant portfolios. The authors create an index of aggregated risk at the portfolio level using several financial indicators based on theory and literature. They then test it on a sample of foundations and their grantees in the state of Georgia. Practitioners and researchers can use this practical, financial-based index to evaluate risk in a variety of contexts and for a variety of research questions.

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REFLECTIVE PRACTICE

69 In Other Words, the Budgets Are Fake: Why One Funder Eliminated Grantee Budgets to Improve Financial Due Diligence

Molly Schultz Hafid, M.P.A., Unitarian Universalist Veatch Program, and Carol Cantwell, Fun With Financials

This article provides a case study in how to engage board and staff members in the development of a new standard for reviewing financial information. The Unitarian Universalist Veatch Program at Shelter Rock eliminated budgets from its application requirements. The authors provide an overview of the process, timeline, and tools used to replace funder budgets with a more accurate review that provided more relevant insight into grantee financial health based on actual financial data.

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Call for Papers

THEMED ISSUE OF *THE FOUNDATION REVIEW* ON PLACE-BASED PROGRAMMING

Abstracts of up to 250 words are being solicited for Volume 7, Issue 3 of *The Foundation Review*. This issue, co-edited with the Aspen Institute Forum for Community Solutions, will be a themed issue on place-based programming. Both local and national funders have initiated efforts to improve conditions within a defined geographic area or community. These efforts may include grantmaking, advocacy efforts, and convenings, among other tactics. Historically, funders have used language including: comprehensive community initiatives, systems change, embedded funders, and collective impact to describe this work. We encourage authors to include their working definition of place-based programming in their submissions. This issue (which may evolve into two issues, depending on the response to this call for papers) will seek to build on the previous work of the Aspen Institute, Grantmakers for Effective Organizations, and others, in understanding the current status and future directions for place-based programming.

Papers are invited on topics including, but not limited to:

- **Strategies.** What are the theories of change and ensuing strategies that have been shown to effectively guide place-based programming?
- **Roles.** What are the roles of national and local foundations? How should they relate to government entities? What roles do intermediary organizations play?
- **Issues and entry points.** What differences, if any, are there in strategies or outcomes if a funder focuses on a specific issue (e.g., education, health) rather than a resident-determined agenda or a community development frame? What capacities need to be in place in the community in order to engage effectively in the change work? How are community capacities related to foundation entry points?
- **Funding decisions.** How does the place-based frame make a difference in what is funded?
- **Funder capacity.** What skills, structures, cultural norms, etc. are needed internally in order for a foundation to be effective in place-based programming?

Submit abstracts to submissions@foundationreview.org by December 1, 2014. If a full paper is invited, it will be due April 1, 2015 for consideration for publication in September 2015.

Abstracts are solicited in four categories:

- **Results.** Papers in this category generally report on findings from evaluations of foundation-funded work. Papers should include a description of the theory of change (logic model, program theory), a description of the grantmaking strategy, the evaluation methodology, the results, and discussion. The discussion should focus on what has been learned both about the programmatic content and about grantmaking and other foundation roles (convening, etc.).
- **Tools.** Papers in this category should describe tools useful for foundation staff or boards. By “tool” we mean a systematic, replicable method intended for a specific purpose. For example, a protocol to assess community readiness and standardized facilitation methods would be considered tools. The actual tool should be included in the article where practical. The paper should describe the rationale for the tool, how it was developed, and available evidence of its usefulness.
- **Sector.** Papers in this category address issues that confront the philanthropic sector as whole, such as diversity, accountability, etc. These are typically empirically based; literature reviews are also considered.
- **Reflective Practice.** The reflective practice articles rely on the knowledge and experience of the authors, rather than on formal evaluation methods or designs. In these cases, it is because of their perspective about broader issues, rather than specific initiatives, that the article is valuable.

BOOK REVIEWS: *The Foundation Review* publishes reviews of relevant books. Please contact the editor to discuss submitting a review. Reviewers must be free of conflicts of interest.

Please contact Teri Behrens, Editor of *The Foundation Review*, with questions at behrenst@foundationreview.org or 734-646-2874.

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