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SPECIAL SECTION ON THEORY OF PHILANTHROPY

- 7** A Foundation's Theory of Philanthropy: What It Is, What It Provides, How To Do It
Michael Quinn Patton, Ph.D., Utilization-Focused Evaluation; Nathaniel Foote, J.D., M.B.A., TruePoint; and James Radner, M.Phil., University of Toronto

This article explains what a theory of philanthropy is, how it contrasts with theory of change, and how it is more than, but incorporates, a foundation's philosophy and strategy. The three authors have more than 100 combined years of organizational consulting experience. The theory-of-philanthropy approach emerged from their work with foundation leaders who were seeking ways to more effectively integrate all aspects of their work – mission and values; governance, strategy, and staffing; resource allocation and evaluation – to increase effectiveness and impact.

DOI: 10.9707/1944-5660.1263

- 21** The Theory of Philanthropy of the Alberta Family Wellness Initiative
James Radner, M.Phil., University of Toronto; Nathaniel Foote, J.D., M.B.A., TruePoint; and Michael Quinn Patton, Ph.D., Utilization Focused Evaluation

This case study presents the theory of philanthropy of the Palix Foundation, which is seeking to improve health and wellness outcomes for children and families in Alberta, Canada, by mobilizing and applying knowledge about brain and early childhood development and the link to lifelong mental health and addiction outcomes. Following a developmental evaluation of a major phase of Palix's work, the foundation's leaders asked the authors to work with them to address questions emerging from the evaluation relating to the next phase in its development. This led to a concentrated effort in a short time to synthesize the foundation's underlying theory of philanthropy and apply it to those questions.

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- 43** The Blandin Foundation: The Journey to a Theory of Philanthropy
Kathy Annette, M.D., Wade Fauth, J.D., and Allison Ahcan, M.A., The Blandin Foundation

This case illustrates a different specific theory of philanthropy and different process for developing a theory of philanthropy. The Blandin Foundation, based in Grand Rapids, Minn., undertook a facilitated, participatory, reflective-practice process over several months with its



senior leadership team and board to develop its theory of philanthropy. Blandin's passionate commitment to vibrant rural communities in Minnesota emerged as the anchor of its theory of philanthropy.

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54 Reflections and Commentary on a Theory of Philanthropy

The conclusion to this special section presents reflections and commentary about the idea, application, and utility of a theory of philanthropy. First is a reflection about being involved in the theory-of-philanthropy process from Michelle Gagnon, president of the Palix Foundation. The authors of the overview article that opened this section then offer some reflections on their experiences – and ongoing learning – with many foundations doing theory-of-philanthropy work. Finally, there are three commentaries from experienced and knowledgeable observers of the philanthropic world, both from within foundations and from the outside working in consultation with foundations. The independent commentators were asked to offer thoughts and reactions after reading the explanation of theory of philanthropy and the two case examples.

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RESULTS

66 Influences of Venture Philanthropy on Nonprofits' Funding: The Current State of Practices, Challenges, and Lessons

Tamaki Onishi, Ph.D., University of North Carolina

This article examines the current state of venture philanthropy practices – defined as market-based approaches to grantmaking - in the nonprofit sector, based on data from a survey of 124 nonprofits that engage in venture philanthropy. The survey probes to what degree nonprofit funders are implementing core activities of venture philanthropy, including the use of market-based funding instruments, providing strategic assistance, board participation, and use of social and financial performance criteria. In addition, seven venture philanthropy organizations were also interviewed for this article; various tactics they have used to mitigate internal and external tensions are examined.

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SECTOR

81 When Backbone Organizations Become the Funder: The Use of Fiscal Intermediaries in the Context of Collective Impact

Jewla Lynn, Ph.D., Kirsten M. Breckinridge, Ed.M., and Ashley Denault, M.P.P., Spark Policy Institute; Chris Marvin, M.B.A., Marvin Strategies

Intermediary organizations are increasingly being engaged to work with grantees in collaborative approaches that aim to solve significant societal problems. At times the backbone organization – the group providing support to the collective effort – takes on the work of a fiscal intermediary. This article explores the complexities of the dual relationship by using examples from the Social Innovation Fund, a White House initiative, and Got Your 6, a collective-impact campaign that seeks to bridge the civilian-military divide. The benefits may outweigh the challenges if the dual role is deployed effectively; participants in the case studies offer insights into this dynamic.

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97 Place-Based Initiatives: Lessons From Five Decades of Experimentation and Experience

James M. Ferris, Ph.D., University of Southern California; Elwood Hopkins, M.U.R.P., Emerging Markets Inc.

Place-based approaches have changed and matured in response to historical conditions. In recent years, a new framework has emerged that views place as an open system where neighborhoods are aligned with larger areas and influenced by market forces and public policy. This article summarizes the findings from a yearlong inquiry into the state of place-based initiatives, underscores the lessons learned, and develops implications for foundation practice. Seven key lessons emerged from this inquiry.

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REFLECTIVE PRACTICE

110 Constancy and Change in the Women's Funding Network: International Horizons and Core Values

Eleanor L. Brilliant, D.S.W., Rutgers University

This article is a case study of women's advocacy funders and their network organization, the Women's Funding Network (WFN). The author analyzes the evolution of the network and its member funds from 1985 to 2012 as they struggled for survival in a complex and changing environment, and examines tensions that exist between the ideals of a social-movement organization and its drive for money, the nature of women's organizational leadership, and what it means to view civil-society activities through a gender lens. This case study illustrates dilemmas inherent in the development of identity-based social-movement organizations as they seek resources for sustainability and prominence in a crowded field. The author includes a timeline of the evolution of the WFN.

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128 Understanding Collective Impact in a Rural Funding Collaborative: Collective Grantmaking in Appalachian Ohio

Judith Millesen, Ph.D., Ohio University

This article documents the history and work of the Appalachian Ohio Funders Group, a nine-member regional grantmaking collaborative committed to strategically enhancing the region's assets through leadership, networking, financial and in-kind investments, leveraged resources, and collaboration. Specific attention is given to what makes the collaborative unique – namely, the organizational diversity of the funding partners, the lack of a shared issue area, and the fluidity of work within the group. The findings provide insight into how meaningful collaboration takes place when funders share a love of place and negotiate the costs and benefits associated with collaborative work, and how an explicit commitment to being creative and adaptive can help a group respond to emergent opportunities.

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155 Creating Choices Before Making Choices: One Family Foundation's Journey to Finding a Strategic Focus

Kelly C. Medinger, M.N.A., Marion I. & Henry J. Knott Foundation; and Angela R. Logan, Ph.D., University of Notre Dame

For family foundations, the family must create grounded and compelling choices for a strategic grantmaking focus that honor the intent of the original donor, accommodate the preferences of the current board, and respond to the conditions of the present community. This article examines the journey of the Marion I. & Henry J. Knott Foundation toward a strategic grantmaking focus. The authors examine a foundation's first step of building a grantmaking strategy – finding an issue or problem to address – and presents a three-part model for creating choices that reflect a foundation's donor intent, organizational talents and resources, and broader community needs. The study adds to the body of knowledge about the value, process, and challenges of finding a strategic grantmaking focus, whether that focus is for all or simply one portion of a foundation's giving portfolio.

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