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Back Matter

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VOL. 8 ISSUE 1

RESULTS

9 Enhancing Funders' and Advocates' Effectiveness: The Processes Shaping Collaborative Advocacy for Health System Accountability in South Africa

Barbara Klugman, Ph.D., Barbara Klugman Concepts; Waasila Jassat, M.Med. Public Health Hub

This article describes the roles of five advocacy groups that built collaborative initiatives to address the collapsing health care system in South Africa. Findings indicate that for both advocacy groups working in alliances and for funders, flexible funding and a shared value system among groups with diverse capacities, constituencies, and reputational resources are keys to enabling adaptive and innovative strategies for holding the public sector accountable.

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24 The Unified Outcomes Project: Evaluation Capacity Building, Communities of Practice, and Evaluation Coaching

Jay Wade, M.A., Leanne Kallemeyn, Ph.D., and David Ensminger, Ph.D., Loyola University Chicago; Molly Baltman, M.A., Robert R. McCormick Foundation; and Tania Rempert, Ph.D., Planning, Implementation, and Evaluation Consulting Inc.

Increased accountability from foundations has created a culture in which nonprofits, with limited resources and a range of reporting protocols from multiple funders, struggle to meet data-reporting expectations. Responding to this, the Robert R. McCormick Foundation in partnership with the Chicago Tribune launched the Unified Outcomes Project, an 18-month evaluation capacity-building project. This article highlights the project's background, activities, and outcomes. The majority of participating grantees benefited from their participation – in particular those that received evaluation coaching.

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40 The Groundwork for Successful Cohort-Based Fiscal Capacity-Building: An Evaluation of the Strengthening Financial Management Initiative

Nancy Devine, B.F.A., The Wallace Foundation

An evaluation of the Wallace Foundation's Strengthening Financial Management initiative shows that it is possible, with well-designed training and support, to enhance the ability of nonprofit leaders to strategically manage their resources for long-term sustainability and programmatic quality. In addition to the two main findings – that building nonprofit financial-management capacity is possible and that the gains arising from the more limited model



were comparable to those seen in the higher-intensity approach – the study uncovered some key success factors with clear implications not only for potential replications of this type of project, but for cohort-based, nonprofit capacity-building efforts more broadly.

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TOOLS

48 Assessing a Foundation’s Contribution to Public-Policy Change: A New Framework

Barbara Masters, M.A., MastersPolicyConsulting; Gigi Barsoum, Ph.D., Barsoum Policy Consulting; and Sandra J. Martinez, M.P.H., and Fatima Angeles, M.P.H., The California Wellness Foundation

Drawing a direct link from a single grantee or funder to a particular policy outcome is extremely difficult, if not impossible, in a complex policy-change environment. This article presents a framework for evaluating a foundation’s role in complex policy-change efforts, based on a 10-year retrospective evaluation of The California Wellness Foundation’s grantmaking in public policy. After examining more than 25 policy outcomes associated with the foundation’s grantmaking priorities, three dimensions of contribution emerged: the role of its grantees relative to other organizations, the prominence of its role and funding relative to other funders or donors, and the degree of alignment between the policy change and the foundation’s policy goals.

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59 Emergent Learning: A Framework for Whole-System Strategy, Learning, and Adaptation

Marilyn J. Darling, M.A., Heidi Sparkes Guber, M.P.S., Jillaine S. Smith, B.A., and James E. M. Stiles, Ed.D., Fourth Quadrant Partners

The field of philanthropy is exploring what it takes to achieve impact in complex environments. The terms “adaptive” and “emergent” are beginning to be used, often interchangeably, to describe strategies by which funders can tackle complexity. The authors offer emergent learning as a framework for going beyond planning tools in order to create the conditions in which emergence can happen – by expanding agency beyond the walls of the funder, distinguishing between goals and strategies and encouraging experimentation around strategies, and supporting whole-system learning, which requires shorter, faster, more rigorous real-time learning and more cross-pollination among peers.

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74 The Philanthropic Collaborative for a Healthy Georgia: Building a Public-Private Partnership With Pooled Funding

Karen Minyard, Ph.D., Mary Ann Phillips, M.P.H., and Susan Baker, M.P.H. Georgia Health Policy Center

Over the past decade, macro-level drivers – deteriorating economic conditions, mounting social needs, and implementation of health care reform – forced some funders of social services to re-examine their budgets and their methods of allocation. As a result, some funders in both the private and public sectors recognized that greater scalability and broader impact might be achieved through jointly aligned efforts. This article explores the origins and structure of the Philanthropic Collaborative for a Healthy Georgia and examines its first initiative: to encourage the development of school health programs in Georgia public schools serving low-income children without access to health services. The collaborative's evolution over a decade demonstrates lessons in trust, flexibility, and shared vision that may be relevant to others exploring pooled funding as a means of aligning resources to achieve greater impact.

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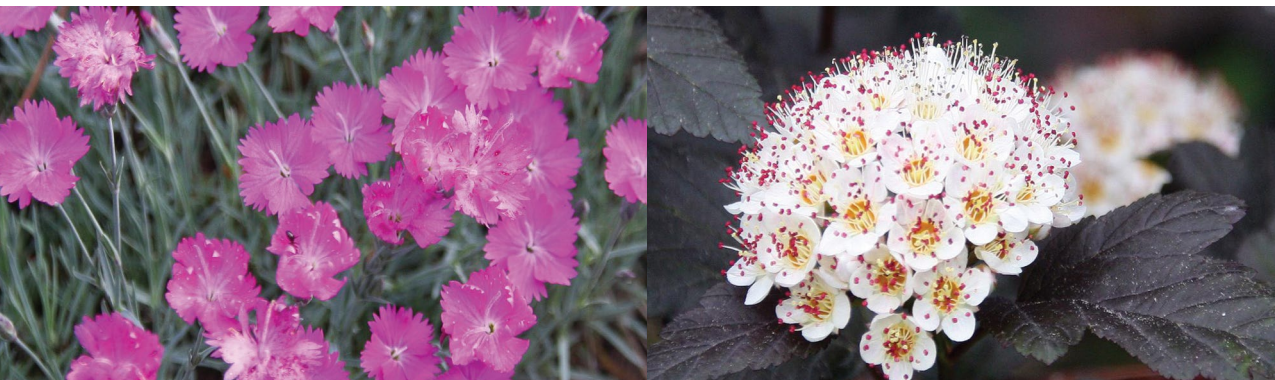
88 InQuery: A Participatory Approach for Understanding Stakeholder Perceptions

Matthew Miliello, Ph.D., East Carolina University; Christopher Janson, Ph.D., University of North Florida; and Drew Tonissen, M.A., North Carolina State University

This article describes the development of the InQuery evaluation tool, which combines Q methodology (factor analysis process to quantify perceptions) with a qualitative participatory approach. InQuery generates both quantified metrics of what participants believe about a given topic and also a rich narrative of why participants think the way they do. These data yield metrics for understanding fidelity, outcomes, and impacts.

The Seattle Community Learning Exchange, an example of InQuery in action from beginning to end, explored how members of a diverse community perceived peacemaking and healing within the community and implemented peacemaking circles by building capacity and shifting perceptions.

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SECTOR

108 Foundations Supporting Research and Innovation in Europe: Results and Lessons From the Eufori Study

Barbara Gouwenberg, M.Sc., Vrije Universiteit Amsterdam; Daniq̄ue Karamat Ali, M.Sc., Necker van Naem Research and Consultancy; Barry Hoolwerf, M.Sc., René Bekkers, Prof. dr, and Theo Schuyt, Prof. dr, Vrije Universiteit Amsterdam; and Jan Smit, Prof.dr, VU University Medical Center Department of Psychiatry

This article presents the most important results of the European Foundation for Research and Innovation Study, the first study to map the roles and collective contributions of Europe's large, heterogeneous, and fragmented sector of research and innovation foundations. The collection of data and the study's final report allowed a better understanding of the role foundations play, and could play, in advancing research across the European Union. The various actors in the domain of research – government, business, foundations, and researchers – each have a distinctive role. Together, they can make a positive difference in the potential for research and innovation in Europe.

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REFLECTIVE PRACTICE

116 Internal Culture, External Impact: How a Change-Making Culture Positions Foundations to Achieve Transformational Change

Amy Celep, M.B.A., Sara Brenner, M.B.A., and Rachel Mosher-Williams, M.P.A., Community Wealth Partners

Foundations increasingly are expected to operate more transparently, accountably, and collaboratively while delivering greater results. At the same time, foundation leaders are reporting pressures from internal challenges that include recruiting and retaining the best talent. This article argues that a foundation's internal culture is critical to achieving large-scale social change, but that efforts to build a change-making culture too often are left out of strategy conversations. While there is no one culture that suits every foundation, a particular set of characteristics must be present in those that seek large-scale social change: a focus on outcomes, transparency, authenticity, collaboration, racial equity, continuous learning, and openness to risk. This article offers insights into why culture can be challenging for foundations to address and maintain, examines cases of successful culture change at foundations, and offers advice for foundations that aspire to it.

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REFLECTIVE PRACTICE

130 Review of Staying the Course

Review by Elizabeth Delaney, M.S.W., Johnson Center for Philanthropy, Grand Valley State University

The overarching theme of this book is that grantmaking decisions – who to fund, which geography to focus on, with which funders to partner, and even who to hire – all need to be made based on strong relationships, built over time, both between the program officer and the grantee and between the grantee and the community which they serve. With the age of technology bringing fewer in-person interactions and more emphasis on quantitative evaluation measures, Delaney was left wondering whether this grantmaking style is something program officers can continue to do.

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Call for Papers

FOR VOLUME 9, ISSUE 1

Abstracts of up to 250 words are being solicited for Volume 9, Issue 1 of *The Foundation Review*. This issue will be an open (unthemed) issue. Papers on any topic relevant to organized philanthropy are invited.

Submit abstracts to submissions@foundationreview.org by May 15, 2016. If a full paper is invited, it will be due Sept. 15, 2016 for consideration for publication in March 2017.

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 grant-making 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 a tool. 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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