

# The Foundation Review

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## Back Matter

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## RESULTS

7

### Aiming High: Foundation Support for State Advocates Brings Universal Children's Health Coverage Within Reach

*Sheila Dunleavy Hoag, M.A., Debra J. Lipson, M.H.S.A., and Victoria Peebles, M.S.W., Mathematica Policy Research Inc.*

To help close the children's health insurance coverage gap in the United States, the Atlantic Philanthropies created the KidsWell Campaign, a nearly \$29 million, six-year initiative to promote universal children's coverage through coordinated state and federal advocacy efforts. This article presents the major results of the KidsWell evaluation, which found substantial progress in achieving interim policy changes and coverage outcomes. While other funders may not be able to make investments as big or as long as Atlantic's was in KidsWell, the amount required may be lower. Children's-advocacy networks and capacities have already been built, and valuable knowledge and experience have been gained.

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## SECTOR

23

### Through the Looking Glass: Foundation Evaluation and Learning and the Quest for Strategic Learning

*Suzanne Kennedy Leahy, Ph.D.; Sandra Wegmann, M.P.A., and Lexi Nolen, M.P.H., Ph.D., Episcopal Health Foundation*

Learning is among the most difficult kind of work organizations do. Strategic learning is neither simple nor efficient to institutionalize or practice, and foundations are still figuring out how to do it well. This article addresses different models that foundations use to establish and staff evaluation and learning functions, what other organizational considerations they should take into account in order to prioritize strategic-learning work, and what tools and approaches can be used to initiate it. Interviews with officers from more than a dozen foundations revealed that strategic learning does not require wholesale structural and cultural change — an incremental approach, instead, can phase in greater complexity as foundations expand staff capacity.

DOI:



38

### Lessons About Evaluating Health-Coverage Advocacy Across Multiple Campaigns and Foundations

*Leslie Foster, M.P.A.; Mary Harrington, M.P.P.; Sheila Hoag, M.A.; and Debra Lipson, M.H.S.A., Mathematica Policy Research*

This article adds more than a dozen years' experience in evaluating major consumer health advocacy initiatives to existing knowledge about advocacy evaluation. Since 2002, Mathematica has evaluated four health insurance coverage advocacy programs sponsored by three foundations. The authors explain how their evaluations were strengthened by articulating a detailed theory of change and emphasizing assessment of interim outcomes from many perspectives and methods. Even with comprehensive data and integrated analysis, however, some ambiguity in the results is inevitable — there is no completely objective way to determine the effectiveness of an advocacy initiative. Moreover, sometimes solid or even exceptional advocacy efforts do not lead to desired policy outcomes. Advocacy initiatives that fail initially may be groundwork for future opportunities.

DOI:

53

### Laying the Groundwork for a National Impact Investing Marketplace

*Stephanie L. Grippe, Ph.D., Impact Finance Center; Joanne Kelley, M.S., Colorado Association of Funders; and Kathy Merchant, M.S.W., Impact Finance Center*

The practice of impact investing is rapidly gaining momentum, but foundations are among the most reluctant investors and represent the smallest share of current activity. Developing cost-effective ways to “prime the pump” for social ventures to become investor-ready — through a capacity-building process that includes outreach, education, and technical assistance — is an essential part of growing the industry. The Impact Finance Center partnered with foundations and other investors in Colorado to create CO Impact Days and Initiative to demonstrate how to address this need for a more efficient and effective marketplace.

DOI:



## REFLECTIVE PRACTICE

68

### Designing Technical-Assistance Programs: Considerations for Funders and Lessons Learned

Jennifer Lyons, M.A., Sheila Dunleavy Hoag, M.A., Cara Orfield, M.P.P., and Sonya Streeter, M.P.H.,  
*Mathematica Policy Research Inc.*

Funders will likely continue to use technical assistance (TA) to expand organizations' capacity, identify solutions to problems, and develop strategies for long-term change. As the demand for TA grows, so does the importance of understanding what works well, for whom, and in what circumstances. In this article, the authors documented some considerations funders can keep in mind to develop strong TA programs, as well as some lessons based on their evaluations of two state-based TA programs. Thoughtful program development, implementation, and evaluation will be essential to better understand how to deliver successful TA that is a worthwhile investment for funders. The recommendations offered in this article aim to promote conversation among funders about effective ways to invest their resources in TA programming.

DOI:

## BOOK REVIEW

79

### *American Generosity: Who Gives and Why*, Patricia Snell Herzog & Heather E. Price

Reviewed by Jason Franklin, Ph.D., *Grand Valley State University*

*American Generosity* explores two core behaviors — whether people give and how much they give — and then tries to understand how and why these behaviors vary across a wide range of factors. At the center of this work is the analysis of SciGen's nationally representative, cross-sectional survey — one of the largest and most rigorous surveys on the topic of generosity ever conducted. Herzog and Price examine the patterns and causes of generosity in the United States and offer a thoughtful development and testing of new and refined frameworks to understand the phenomenon of generosity in general. While geared primarily to scholars exploring these issues, *American Generosity* will also prove of interest for fundraisers and other nonprofit leaders looking to strengthen and deepen their resource development strategies. But for its primary academic audience, it capably achieves what it set out to do — to provide a rigorous, data-driven grounding for future research into the science of generosity.

DOI:

# call for papers

## FOR VOLUME 9, ISSUE 4

Abstracts of up to 250 words are being solicited for Volume 9, Issue 4 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](mailto:submissions@foundationreview.org) by March 15, 2017. If a full paper is invited, it will be due June 30, 2017 for consideration for publication in December 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 for a giving circle 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.

**Questions?** Contact Teri Behrens, editor of *The Foundation Review*, at [behrenst@foundationreview.org](mailto:behrenst@foundationreview.org) or call 734-646-2874.

# thanks to our reviewers!

We'd like to thank our peer reviewers for Volume 8 of *The Foundation Review* for their time, expertise, and guidance. The peer-review process is essential in ensuring the quality of our content. Thank you for your contributions to building the field of philanthropy!

If you are interested in peer reviewing for Volume 9, send an email to Teri Behrens, Editor in Chief, at [behenrst@foundationreview.org](mailto:behenrst@foundationreview.org).

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To learn more, contact Teri Behrens, Ph.D., director of the Institute for Foundation and Donor Learning, at [behrenst@gvsu.edu](mailto:behrenst@gvsu.edu), or call 616-331-7585.



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