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## Back Matter

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# executive summaries

## Results

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### Partner-Centered Evaluation Capacity Building: Findings from a Corporate Social-Impact Initiative

*Lisa Frantzen, M.B.A., TCC Group; Julie Solomon, Ph.D., J. Solomon Consulting, LLC; and Laura Hollod, M.P.H., Johnson & Johnson Global Community Impact*

Funders can play a proactive role in helping to fill the gap between funders' expectations and nonprofits' ability to evaluate grant results. Using a partner-centered design, Johnson & Johnson piloted an evaluation capacity-building initiative that supported eight grantees in strengthening their ability to measure and use findings concerning health-related outcomes, by focusing on key evaluation challenges identified by the grantees. This article describes the design, implementation, and results of a participatory, nonprofit-partner-centered evaluation capacity-building initiative, and shares learnings from the perspectives of both the corporate funder and the nonprofit participants.

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### Cricket Island Foundation: A Case Study of a Small Foundation's Impact Assessment

*Anna Pond, M.P.A., Anna Pond Consulting; Seema Shah, Ph.D., COMM|VEDA Consulting; and Elizabeth Sak, M.B.A., Cricket Island Foundation*

Following its 15th year anniversary, the Cricket Island Foundation's board was eager to learn more about the outcomes of its approach and identify ways to strengthen its impact, particularly as it was expanding its work from New York and Chicago into a third city, New Orleans. The Board commissioned an independent consultant to undertake a multi-method assessment of its grantmaking portfolio both to look back on its impact and to inform future decision-making and strategy. This paper explains the assessment methodology, examines the results of the assessment, and describes the steps the Foundation has taken following the assessment to integrate its findings. In doing so, this article provides a case study of how a small foundation, with modest resources, can engage in an organizational learning process through assessment and build a culture of inquiry to help understand its impact over the long-term, without engaging in an expensive, labor-intensive evaluation.

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## Tools

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### Less Is More: How Grantmakers Are Using Simple Financial Metrics

*Hilda H. Polanco, C.P.A., FMA and Luther K. Snow, M.B.A., Independent Consultant*

This article explores how the Financial Health Analysis Tool can bridge the gap between the capacity of grantmakers to conduct financial analysis and the need to incorporate financial considerations into both grantmaking and ongoing engagement with grantees.

The tool presents four years of key financial indicators in graphs and charts that create a kind of dashboard of a nonprofit's financial health over time. This small set of simple metrics highlights patterns and trends that can help grantmakers and nonprofits see how the financial management of an organization is advancing its mission and strategy. Using a series of interviews with a group of early users of the tool, this article looks at how these metrics are deployed in practice by grantmakers and illustrates three areas where they can be of particular utility: due diligence and evaluating grants; capacity building; and recognizing larger patterns and opportunities.

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## Sector

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### Unpacking the Role of Data in Philanthropy: Prospects for an Integrated Framework

*R. Patrick Bixler, Ph.D., University of Texas at Austi; Marisa Zappone, LMSW, Mission Capital; Lin Rui Li, University of Texas at Austin; and Samer Atshan, University of Texas at Austin*

When combined with financial resources, data is being seen as the fuel for innovation and social change; yet, there is no one way that “data” is conceptualized in its various functions. This article, based on participant observation and interviews with charitable foundations in Central Texas, reveals a complex and nuanced approach to data in philanthropy. Results suggest that data is generated and used in a multiplicity of ways, including for: need identification, fund programs/research, evaluation and learning, and measuring community impact. Six recommendations are identified that offer best practices for integrating a data perspective into philanthropic work. These include: view evaluation as a tool for learning, create a safe space to share data, clarify what is “good data” and “good evaluation”, fund evaluation efforts of partners, support evaluation capacity, and advocate for community data infrastructure.

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### Learning from the Opportunities and Challenges of a Philanthropy-Private Sector Partnership

*Victoria C. Scott, Ph.D., M.B.A., University of North Carolina at Charlotte; Andrea Lamont, Ph.D., MAS, and Abraham Wandersman, Ph.D., University of South Carolina; Leslie Snapper, B.S., University of North Carolina at Charlotte; Mona Shah, Ph.D., M.P.H., Robert Wood Johnson Foundation; and Erik Eaker, M.H.A., Humana, Inc.*

A philanthropy — private (sector) partnership (PhPP) is a cross-sector partnership that is rare in practice. These collaborations have the potential to yield positive returns for philanthropy organizations, businesses, as well as the broader community. This article draws upon an evaluation of the Robert Wood Johnson Foundation and Humana partnership to highlight key insights for forming and implementing a formal partnership between a philanthropy organization and an investor-owned business. For philanthropy staff interested in establishing

# executive summaries (continued)

a PhPP, the findings suggest the following four key considerations: 1) exercise due diligence in exploring partnership fit, 2) actively engage philanthropy staff and address key partnership issues, 3) use a process of co-creation on partnership activities, and 4) continuously monitor and assess the partnership.

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## Reflective Practice

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### Developmental Evaluation of a Collective Impact Initiative: Insights for Foundations

*Glenn Landers, Sc.D., Georgia State University; Kelci Price, Ph.D., Colorado Health Foundation; and Karen Minyard, Ph.D., Georgia State University*

The 2011 publication of John Kania and Mark Kramer’s influential paper, “Collective Impact,” caught the attention of organizations across sectors, including nonprofit organizations and philanthropies. The Colorado Health Foundation was one of the organizations that saw the potential of collective impact to help tackle the state’s complex, systems-level health issues. This article describes a collective impact initiative and the role that developmental evaluation — and a realist framework — played in aiding both the initiative’s steering committee and the Colorado Health Foundation in making decisions about the initiative’s accomplishments and future. The article highlights the developmental evaluation approach, how that informed decisions, and how it helped surface broader insights about the many challenges of doing highly collaborative work.

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### Resilient Funders: How Funders Are Adapting to the Closing Space for Civil Society

*Chris Allan, M.A., Ajabu Advisors, and Scott DuPree, Ph.D., Civil Society Initiatives*

The closing space of civil society around the world over the last decades has created profound challenges for funders. Increased adaptive capacity along three dimensions — varied procedures, multiple strategies, and an adaptive environment — promotes the flexibility to weather the shocks and stresses of tightening restrictions and increasing violence. Within those dimensions, funders are finding that three characteristics of resilience are especially critical: flexibility; diversity and redundancy; and resourcefulness and ability to learn. Drawing on lessons from the experience of those working in countries of concern, this article proposes a conceptual framework for weathering threats from changing conditions, with the aim of providing a simple yet powerful way of assessing and improving current practices.

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# call for papers

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## FOR VOLUME 10, ISSUE 3

Abstracts of up to 250 words are being solicited for Vol. 11, Issue 3 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 Sept. 15, 2018. If a full paper is invited, it will be due Jan. 31, 2019 for consideration for publication in September 2019.

### 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 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.

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

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**Our Mission:** To share evaluation results, tools, and knowledge about the philanthropic sector in order to improve the practice of grantmaking, yielding greater impact and innovation.

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