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Front Matter

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The Foundation Review is the first peer-reviewed journal of philanthropy, written by and for foundation staff and boards and those who work with them implementing programs. Each quarterly issue of *The Foundation Review* provides peer-reviewed reports about the field of philanthropy, including reports by foundations on their own work.

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.

The Foundation Review is a proud product of the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University.

Front cover photo: Statue of L. WIlliam Seidman, a prominent business leader in Grand Rapids, Mich., former chair of the F.D.I.C. during the savings and loan crisis, and one of the principal founders of Grand Valley State University.

Photographer: Amanda Pitts

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Statement of the Editorial Advisory Board

We believe that the forthright sharing of information among foundations and nonprofits builds a knowledge base that strengthens their ability to effectively address critical social issues. We encourage foundation donors, boards, and staff to honor this transparency in their own practices and to support others who do so.

Editorial

Dear readers,

Michael Moody, Ph.D.

This issue of *The Foundation Review* tackles the persistent, complicated, and often difficult topic of "donor intent and legacy." This has been a focus of my work as the Frey Foundation Chair for Family Philanthropy for the past couple years, including intensive discussions at the 2017 National Summit on Family Philanthropy about how family donors can honor intent and steward legacy *while also* maximizing impact in today's world. The original research reported in this special issue offers further keen insights and practical lessons on this perennial philanthropic challenge.

The complexities of donor intent and legacy touch all aspects of philanthropy — from writing mission statements, to devising strategy, to making grant decisions, to evaluating impact. Intent *and* legacy both enable and constrain grantmaking practice; they can be the source of inspiration *and* frustration. Navigating the complicated issues around donor intent and legacy means confronting many of the core questions of effective giving — questions about power, transparency, collaboration, expertise, loyalty, and the engagement of diverse voices.

The three articles on family foundation initiatives, and one book review, contained in the special section of this issue touch on this range of complicated issues. The first, by **Baker, Cox, Chopus, and McGinty,** gives a remarkably candid and reflective account of the lessons learned by the Robins Foundation in Richmond, Virginia, from an ambitious initiative to "prepare young children in a low-resourced neighborhood for kindergarten." The analysis describes the Foundation's intent in creating the project, reviews unexpected challenges that arose (especially in the funder-grantee partnership), and ends with three practical recommendations for how to structure such partnerships to avoid "unplanned" legacies from "big bet" initiatives.

Chernoff and Chaudhry offer an equally candid case study of the Leeway Foundation's 25-year transition, explaining how the organization has remained true to the founder's vision while fundamentally transforming its approach to funding women artists in Philadelphia to better incorporate concerns of social and racial justice, gender equity, and trans affirmation. The Leeway story shows how such organizational transformations, while "messy," can be informed by close engagement with external partners (like with the Robins case in the previous article) and can actually help clarify the original donor's vision over time.

The **Medinger and Brodsky** article offers exceedingly practical tips for a common legacy initiative of family foundations: creating a family and donor legacy video. The authors detail the benefits of video storytelling, and offer compelling evidence from one family foundation of how the creation of a legacy video actually ignited greater multigenerational engagement in the foundation. We see in this article how donor intent and legacy can be dynamic and inspiring to grantmakers, if captured and utilized in effective ways.

Finally, veteran consultant and family foundation trustee Ashley **Blanchard** offers a thoughtful review of the second edition of a book many consider a "classic" resource for family foundations. Blanchard describes how *Splendid Legacy 2* continues to be an indispensable resource for families, especially as they face tough decisions about how to best institutionalize their goals and insure their own "splendid legacy."

In addition to the special section, this issue of the *Review* also includes two other fascinating and widely useful articles. The first, by Carla **Roberts**, describes a multi-year strategic transformation of the Fremont Area Community Foundation in Michigan. While focused on a community foundation rather than a family foundation, challenges related to implementing "donor intent and legacy" surface in this case study as well. Roberts describes similar efforts to balance a core commitment to improving the quality of life in the community — a mission that has guided the foundation since its founding — with efforts to refine grantmaking priorities for greater impact. She also offers lessons on how to manage this goal-oriented transformation in close dialogue with grant partners.

The second article, by **Myrick, Powell, and Bain**, is based on a large survey of grant managers and other key staff from a diversity of grantmakers. The survey investigated how values influenced the foundations' practices, and how this values-practices link can be made most effectively, for the benefit of both "grantmakers and grant seekers alike." Of course, in many grantmaking organizations values emerge from, or are closely tied to donor intent and legacy. And this thorough article shows how those core values show up — should influence — all aspects of any grantmaker's work.

I hope all of the articles in this issue shed new and helpful light on the challenges raised by the ever-present issue of donor intent and legacy — an issue that touches all aspects of grantmaking, and always seems to be part of the philanthropic conversation.

Michael Moody, Ph.D., Guest Editor
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