

The Foundation Review

Volume 10

Issue 3 *Donor Intent and Legacy*

Article 4

9-2018

Front Matter

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Recommended Citation

(2018) "Front Matter," *The Foundation Review*: Vol. 10: Iss. 3, Article 4.

<https://doi.org/10.9707/1944-5660.1431>

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In this issue:

Reflective Practice —————
From Charitable Giving to Strategic Impact..... **7**

Sector —————
Leading with Values..... **22**

Special Section on Donor Intent and Legacy ———
Unplanned Donor Legacies..... **39**

From Donor Intent to New Horizons..... **52**

Video Storytelling..... **66**

Book Review:
Splendid Legacy 2..... **77**

Executive Summaries..... **81**

Call for Papers **84**

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PUBLISHED QUARTERLY

VOL. 10 ISSUE 3 | SEPTEMBER 2018

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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.

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Editorial

Dear readers,

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



Michael Moody, Ph.D.

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

Frey Foundation Chair for Family Philanthropy

Dorothy A. Johnson Center for Philanthropy at Grand Valley State University

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This publication is printed with soy ink. Printed in USA

Contents

VOL. 10 ISSUE 3

Reflective Practice

- 7** From Charitable Giving to Strategic Impact: The Fremont Area Community Foundation

Carla A. Roberts, M.F.A., Fremont Area Community Foundation

Sector

- 22** Leading With Values: Grants Management and the Case for More Consistent, Effective Grantmaking Practices

Elizabeth Myrick, M.A., Elizabeth Myrick Consulting LLC; Nikki Powell, B.A., PEAK Grantmaking; and Tonia Bain, B.Ph., Tonia Bain Consulting

Special Section

- 39** Unplanned Donor Legacies: How to Avoid Them, and How One Family Foundation Corrected Course with an Evaluation

Saphira Maude Baker, M.P.A., Communitas Consulting; Kelly Chopus, B.A., Robins Foundation; Casey Cox, B.A., Communitas Consulting; and Anita McGinty, Ph.D., University of Virginia

- 52** A Visionary Organization: From Donor Intent to New Horizons of Race and Gender Equity

Carolyn Chernoff, Ph.D., Moore College of Art and Design; V Varun Chaudhry, M.A., Northwestern University

- 66** Bringing Legacy to Life: How Video Storytelling Inspires Multigenerational Involvement in Family Philanthropy

Kelly C. Medinger, M.N.A., Marion I. & Henry J. Knott Foundation; Debbie M. Brodsky, B.S., DMB Pictures

- 77** Book Review – *Splendid Legacy 2: Creating and Re-Creating Your Family Foundation*

Reviewed by Ashley Blanchard, M.P.P., strategy consultant to family foundations at Blanchard Consulting

Plus

- 81** Executive Summaries

- 84** Call for Papers

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