

# The Foundation Review

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Volume 10

Issue 3 *Donor Intent and Legacy*

Article 11

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## Back Matter

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# Executive Summaries

## Reflective Practice

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

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

In 2011, the Fremont Area Community Foundation launched a community investment strategy, focused on education, poverty, and economic development, that shaped corresponding aspirational goals aimed at improving the quality of life for residents of rural Newaygo County, Mich. While there had been significant community involvement and input into foundation planning for a number of years, the announcement of these strategic goals and their implementation created some apprehension among the local nonprofits. As the foundation moves ahead with its second five-year strategic plan, it is being guided through a continued process of change by research and learning, community feedback, results from key grantee surveys, and evidence of where the work has contributed to positive outcomes for the population it serves.

DOI: 10.9707/1944-5660.1424

## Sector

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### **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*

This article identifies and explores a set of philanthropic priorities and aspirations that are widely shared by grantmakers today, and examines how the notion of shared values might inspire a fieldwide pursuit of more consistent, effective, values-driven grantmaking practices. To study the relationship between grantmaker values and grantmaking practices, a survey of more than 300 organization members of PEAK Grantmaking, a national association of specialists in grants management, asked how the respondent foundations' values influence their work. The research led to four recommendations for grantmakers: articulate organization values; find common ground with others around shared values; identify the most effective values-driven grantmaking practices; and pursue those practices to the benefit of grantmakers and grant seekers alike.

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# Executive Summaries (continued)

## Special Section: Donor Intent and Legacy

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### 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*

Based on an evaluation of a place-based initiative of the Robins Foundation in Richmond, Virginia, the authors delineate the ways in which the foundation's relationship, influence, and expectations around a collaborative community-based partnership shape its legacy. They show how the experience of developing and completing a comprehensive evaluation — which involved a look outward at impact and a look inside the relationship network of the partnership — ended with a family foundation modifying its approach to grantmaking and community partnerships. The authors provide three principles for donors to consider in their own reflections of their funder-grantee partnerships: (1) create an equitable working partnership, (2) engage in continuous mutual learning, and (3) evaluate to match implementation with intent.

DOI: 10.9707/1944-5660.1426

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### 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*

This article documents the unique trajectory of the Leeway Foundation as it, over 25 years, shifted in structure and grantmaking, yet remained in line with its founder's original mission: to fund women artists in the Philadelphia region. Through analysis of qualitative data, the authors analyze a 3-stage transition from the founder's initial intentions to what is now an organization informed by models of racial and gender equity, funding women, trans, and gender non-conforming artists working for social change. This analysis identifies strategies and best practices for other foundations in transition, revealing ways that organizations can remain true to donor intent and founding vision while growing, changing, and pushing boundaries for the benefit of constituents and the larger culture.

DOI: 10.9707/1944-5660.1427

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## 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*

Most foundations go through some sort of process to define donor intent and formalize their values, whether at the beginning of their lifespan or after their founders' passing. Video is a powerful tool in that process, vividly bringing stories to life for family members, both older and younger alike. This article examines how a donor legacy video can help inspire multigenerational participation in the governance of a family foundation. Grounded in research and reflective practice, this article details the power of video in preserving family stories, the goals and outcomes of the Marion I. & Henry J. Knott Foundation's video project, and some practical suggestions for other grantmakers who wish to share their legacy in this way.

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## 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*

*Splendid Legacy 2* comes 15 years after the publication of its predecessor, which has long been considered a definitive resource on creating a family foundation. This updated version offers refined practical tips, examples, and analysis on the range of topics and choices facing families. The reviewer finds this new edition to be a fine resource for anyone involved in family philanthropy, even if it doesn't purport to have all the answers.

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# Call for Papers

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## FOR VOLUME 11, ISSUE 4

Abstracts of up to 250 words are being solicited for Vol. 11, Issue 4 of *The Foundation Review*. This issue will be an open (unthemed) issue. Papers on any topic relevant to organized philanthropy are invited.

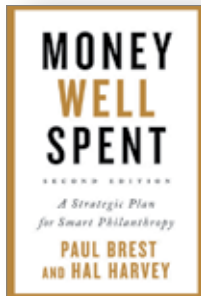
Submit abstracts to [submissions@foundationreview.org](mailto:submissions@foundationreview.org) by March 15, 2019. If a full paper is invited, it will be due June 28, 2019 for consideration for publication in December 2019.

### 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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Second Edition

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*Innovating Our Way to Sustainability*

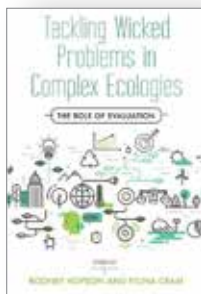
Michael Lenox and Aaron Chatterji



**The Green Bundle**

*Pairing the Market with the Planet*

Magali A. Delmas with David Colgan



**Tackling Wicked Problems in  
Complex Ecologies**

*The Role of Evaluation*

Edited by Rodney Hopson  
and Fiona Cram



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