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## Executive Summary

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## Results

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### Designing for Emergence: The McCune Charitable Foundation Grows Agency Across New Mexico

*Marilyn J. Darling, M.A., Heidi Sparkes Guber, M.P.S., and Jillaine S. Smith, B.A., Fourth Quadrant Partners; and Wendy Lewis, B.A., McCune Charitable Foundation*

The inherent power imbalance in the grantmaker/grantee relationship has come into particular focus as equity and justice have become a greater priority for philanthropy. The McCune Charitable Foundation deliberately designed an emergent strategy approach that established clear goals and then created a platform to permit a reversal of that power dynamic, so that leadership for priorities comes from those closest to the work. The authors launched a two-year project to research what emergence might look like in seven complex social-change initiatives, and how the strategy could grow agency and create more sustainable solutions in dynamic environments.

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### Better Together: Engaging Stakeholders in Learning and Leadership to Guide Foundation Resources Toward Adaptive Systems Change

*Nadine Long, M.P.A., Kansas Health Foundation; Kimber P. Richter, Ph.D., University of Kansas School of Medicine; Jennifer Elise Avers, M.S., Jennifer Elise Avers LLC; and Rick Cagan, A.B., National Alliance on Mental Illness-Kansas*

In 2014, the Kansas Health Foundation brought together a group of knowledgeable stakeholders from a multitude of specialties to focus on reducing tobacco use specifically among Kansans with mental illness. The wealth of knowledge, experiences, and perspectives brought to the discussion resulted in a more productive dialogue about this complex issue. The stakeholder engagement model proved very effective, as evidenced by the group's success in achieving a number of policy, system, and environmental changes — including expanding cessation benefits available under Medicaid in Kansas — and could be replicated by any foundation.

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## Tools

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### Learning Together: Cohort-Based Capacity Building and the Ripple Effects of Collaboration

*Sonia Taddy-Sandino, M.P.I.A., and Mary Gray, Ph.D., Engage R+D; and Danielle Scaturro, M.B.A., The Edna McConnell Clark Foundation*

Funders like the Edna McConnell Clark Foundation are exploring ways to fully engage grantees, co-funders, technical consultants, and evaluators in collective learning and reflection. The foundation's comprehensive, cohort-based capacity-building program, *PropelNext*, was designed to enhance the performance of promising nonprofits that serve America's disadvantaged youth. With a combination of financial support, individualized coaching, and peer-learning sessions, grantees engage in a test-and-learn cycle to promote a culture of learning and continuous improvement. This article highlights strategies and tools to accelerate change, strengthen funder-grantee interactions, and advance the field.

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## From Idea to Initiative: Real-Time Learning for a Funder Collaborative on Nonprofit Strategic Restructuring

Way-Ting Chen, I.M.B.A., and Shannon Johnson, M.B.A., *Blue Garnet*; Lynn Alvarez, J.D., *California Community Foundation*; Carrie Harlow, M.P.A., *The Ahmanson Foundation*; and Jennifer Price-Letscher, M.P.O.D., *The Ralph M. Parsons Foundation*

Evaluation and learning are often seen as high-stakes, formalized processes of comparing an effort at its conclusion against some standard or benchmark. More recently, developmental approaches to evaluation have been created to accommodate the need for more adaptability and ambiguity in an effort. The Nonprofit Sustainability Initiative, a multiyear collaboration of 17 funders in Los Angeles County, California, supports nonprofit organizations to collaborate and restructure in a variety of forms. As the initiative evolved, its evaluation and learning system had to have the ability to evolve with it. This article presents key design aspects of the system, describes how it evolved over time, and shares insights and learnings.

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## Below the Waterline: Developing a Transformational Learning Collaborative for Foundation Program Officers

Annie Martinie, M.P.A., *Danville Regional Foundation*; Jaime N. Love, M.Ed., *Institute for Sustainable Communities*; Michael Kelly, Ph.D., *Paso del Norte Health Foundation*; Kirsten Dueck, M.A., *PATH Foundation*; and Sarah Strunk, M.H.A., *Healthy Places by Design*

Learning from fellow grantmakers is imperative in today's ever-changing world. In late 2016, four health legacy foundations partnered to launch the Health Legacy Collaborative Learning Circle. This article describes the yearlong process of creating the collaborative, and presents a new learning framework — based on the iceberg metaphor — that can be used to create learning environments that test and expand assumptions about promising approaches to common population health challenges, explore organizational best practices related to programming and operations, and understand the roles and impacts peer health legacy foundations have in their communities.

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## Reflective Practice

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## Evaluating for the Bigger Picture: Breaking Through the Learning and Evaluation Barriers to Advancing Community Systems-Change Field Knowledge

Thomas Kelly, M.P.H., *Hawai'i Community Foundation*; Prudence Brown, Ph.D., *Independent Consultant*; Hanh Cao Yu, Ph.D., *The California Endowment*; and Marie Colombo, M.A., *Skillman Foundation*

Foundations investing in community systems change often fail to prioritize field-level and cross-initiative evaluation questions in building initiatives. As a result, many of the documented evaluations of such investments lack translatable lessons specific and influential enough to drive related decisions and actions of others in the field. This article developed from ongoing, multiyear peer learning across several foundations that collectively compiled recommendations for community systems-change funders and evaluators to implement more powerful evaluations. They are intended to help funders and evaluators engaged in these efforts build sectorwide knowledge capable of informing improved work across initiatives and communities.

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## More Than Listening: Harnessing the Power of Feedback to Drive Collaborative Learning

*Clare Nolan, M.P.P., Engage R+D; Kim Ammann Howard, Ph.D., and Kelley D. Gulley, M.B.A., The James Irvine Foundation; and Elizabeth Gonzalez, Ph.D., College Futures Foundation*

Foundations can and should do a better job of gathering feedback from and learning with both grantees and the communities they seek to serve. Gathering meaningful input is difficult, however, given power dynamics between foundations and those they support. This article explores how foundations can harness the power of feedback to improve philanthropic practice, using the experiences of the James Irvine Foundation as a case example. It provides information about the foundation and its commitment to constituent feedback, presents two cases from its own experience gathering feedback from community stakeholders and grantee partners, and then lays out a series of culminating lessons and insights based on this work.

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## Learning About Neighborhood Change Through Funder-Grantee Collaboration

*Debra Dahab, Ph.D., Enquire Research; Brooke Finn, M.S., NeighborWorks America; Lois Greco, B.A., Wells Fargo Regional Foundation; and Nancy Kopf, M.P.A., NeighborWorks America*

NeighborWorks America and the Wells Fargo Regional Foundation regularly engage in collaborative learning processes with their grantees and partners to support local revitalization practices and inform program and grantmaking strategies. This article reflects on the key ingredients and processes needed to develop and sustain collaborative learning over time among grantee organizations, community residents, other stakeholders and funding partners, as well as the critical role that providers of technical assistance play. Examples of organizations of varying size and capacity illustrate grantee and funder perspectives in the collaborative learning process and how the results are being used to advance solutions to local issues and shift program and funding strategies.

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## Book Review

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### *Giving Done Right: Effective Philanthropy and Making Every Dollar Count* by Phil Buchanan

*Reviewed by Paul G. Putman, Ph.D., Cleveland Foundation*

Buchanan has written a helpful yet not oversimplified guide to coach individual givers at all levels. One real strength of *Giving Done Right* is its mix of voices from philanthropic and nonprofit leadership. The author is at his best when describing nonprofit partners and sharing their stories. Buchanan challenges some pervasive myths, highlights the importance of clear goals, and explores ways to give. Buchanan encourages support for strong impact assessment efforts among nonprofits and warns against simplistic approaches. If readers do nothing more than create time and space to reflect upon the questions posed, the author's efforts will be worthwhile. And, in Buchanan's own words: "If this sounds like a lot of work, that's because it is."

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