

# The Foundation Review

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Volume 12 | Issue 2

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6-2020

## Back Matter

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### Recommended Citation

(2020). Back Matter. *The Foundation Review*, 12(2). <https://doi.org/10.9707/1944-5660.1522>

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# Executive Summaries

VOL. 12 ISSUE 2

## Tools

7

### A Canary in the Payout-Rate Coal Mine

John C. Alexander, Jr., Ph.D., Clemson University

Volatility in capital markets — or in social conditions — may cause a deluge of ad hoc payout discussions. This article constructs a metric using equity and bond market yields as a quantitative leading indicator of when a payout-rate discussion may be warranted. While this methodology might be more of a resource to university-affiliated or public foundations, which have complete discretion over the level of the payout rate, private foundations might find understanding the sustainable payout of a portfolio useful in determining the potential erosion of the corpus caused by an unsustainable payout rate.

DOI: 10.9707/1944-5660.1515

## Reflective Practice

14

### Is More Always Better? A Reflection on the Dynamic Nature of Nationally and Regionally Focused Funder Collaboratives

Jo Carcedo, M.P.Aff., Episcopal Health Foundation; Merry Davis, B.A., Blue Cross and Blue Shield of North Carolina Foundation; Megan Folkerth, M.P.H., Interact for Health; Lori Grubstein, M.P.H., M.S.W., M.P.A., Robert Wood Johnson Foundation; and Chris Kabel, M.P.H., Kresge Foundation

Funding alliances are increasingly important in the quest for social change in the face of large-scale challenges like climate change, political polarization, and inequity, which require contributions from across sectors to create meaningful impact. This article, based on a reflective survey and conversation with its funders, describes The BUILD Health Challenge®. Its structure allows regional philanthropies the opportunity to inform the national agenda and contribute insights as to what works locally. Emerging evidence on benefits include shifts in confidence to take risks and new approaches to grantmaking.

DOI: 10.9707/1944-5660.1516

27

## Turning Changemaking Inward: How One Health Philanthropy Transformed Its Grantmaking Approach to Drive Deeper Impact

*Christina Ellis, B.S., Medical College of Wisconsin; Laura Pinsoneault, Ph.D., Evaluation Plus; Sarah Deering, B.S., Jesse Ehrenfeld, M.D., Erin Fabian, J.D., and Cheryl Maurana, Ph.D., Medical College of Wisconsin*

In 2014, the Medical College of Wisconsin's Advancing a Healthier Wisconsin Endowment made a significant shift in focus to supporting adaptive rather than programmatic solutions to address critical health issues. The endowment's new approach emphasized engagement with key stakeholders, recognizing the importance of contribution over attribution and requiring a long-term perspective on outcomes. This article discusses how the endowment experimented with a new model of creating change, ultimately translating new knowledge from national thought leaders and aligning it with its own experiences to guide the endowment's work.

DOI: 10.9707/1944-5660.1517

38

## Women's Grantmaking for Economic Security: The Work of One Coalition

*Elizabeth May Gillespie, Ph.D., University of Memphis*

The author focuses on a poorly understood aspect of philanthropy — how foundations are fostering economic security for women. Prosperity Together is a coalition of 30 of women's grantmaking funds dedicated to advancing women's economic security. Drawing on data from a landscape scan of the coalition's members and interviews with leaders from member funds, the author seeks to contribute to the development of a framework for advancing women's economic security that draws on the extent to which the work women's funds are doing aligns with research recommendations.

DOI: 10.9707/1944-5660.1518

54

## Coherent Assistance in Education Improvement: How Foundations Can Help

*Ann Jaquith, Ph.D., and Rosa Chavez, M.S., doctoral candidate, Stanford University Graduate School of Education*

Philanthropic organizations are experimenting with ways to support capacity building in order to scale innovations and leverage funding for greater social impact. Increasingly, philanthropies are also attending to their own organizational needs for learning in order to inform strategy, shape future work, and measure effectiveness. This article shares the lessons of the Aligned Partners Project, a three-year study of a foundation-funded interorganizational collaboration to align the work of three technical assistance organizations to meet the needs of one school district. It identifies challenges to providing coherent assistance and grantmaking practices that could address them.

DOI: 10.9707/1944-5660.1519

66

## Lessons From the Assessment for Learning Project: Strategies for Building an Authentic Learning Community

*Heather Lewis-Charp, M.A., and Daniela Berman, M.A./M.P.P., Social Policy Research Associates; Sarah Lench, M.P.A., Center for Innovation in Education; and Tony Siddall, M.B.A., Next Generation Learning Challenges*

This article explores findings from an evaluation of the Assessment for Learning Project, a grantee engagement strategy led by the Center for Innovation in Education focused on creating a learning community founded in continuous reflection and safety for risk-taking. The project's model and approach are grounded in the core design elements of a field-facing learning agenda, grantmaking that leads with learning, and collective leadership. This article highlights practices such as a Request for Learning, a requirement that grantees provide formative feedback to each other, and public demonstrations of learning.

DOI: 10.9707/1944-5660.1520

80

## The Experiences of a Foundation With a Limited Life: Benefits and Challenges

*Lynda Mansson, M.B.A., MAVA Foundation*

This article discusses the benefits and drawbacks of a limited-life foundation. The strengths, including a sharpened strategic focus and sense of urgency, and the challenges, such as ensuring impact and dealing with grantee dependency, are also relevant when closing a program. Reflecting on her experiences, the director general of the MAVA Foundation discusses lessons on preparing for the end date of a limited-life foundation. MAVA, a Swiss-based grantmaking foundation for 25 years, has a planned end date of 2022.

DOI: 10.9707/1944-5660.1521

# Call for Papers

## FOR VOLUME 13, ISSUE 3

Abstracts of up to 250 words are being solicited for Vol. 13, 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 August 31, 2020. If a full paper is invited, it will be due March 31, 2021 for consideration for publication in September 2021.

### 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 grantmaking 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.

Authors can view full manuscript specifications and standards before submitting an abstract at <https://johnsoncenter.org/author-guidelines>.

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



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*Published Quarterly by the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University*

[www.thefoundationreview.org](http://www.thefoundationreview.org)

ISSN 1944-5660 | eISSN 1944-5679