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Executive Summaries

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Tools

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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.

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Reflective Practice

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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.

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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.

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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.

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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.

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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.

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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.

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