

The Foundation Review

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Front Matter

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The Foundation Review is the first peer-reviewed journal of philanthropy, written by and for foundation staff and boards and those who work with them implementing programs. Each quarterly issue of *The Foundation Review* provides peer-reviewed reports about the field of philanthropy, including reports by foundations on their own work.

Our mission: To share evaluation results, tools, and knowledge about the philanthropic sector in order to improve the practice of grantmaking, yielding greater impact and innovation.

The Foundation Review is a proud product of the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University.



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We believe that the forthright sharing of information among foundations and nonprofits builds a knowledge base that strengthens their ability to effectively address critical social issues. We encourage foundation donors, boards, and staff to honor this transparency in their own practices and to support others who do so.

Editorial

Dear readers,

Context matters in philanthropy. The articles in this issue touch on the role of context in various ways.

One of the contentious topics in philanthropy is the payout rate. During the current time of multiple crises (health, economic, and racial justice), many commentators are advocating for increased payout rates from foundations. **Alexander** constructs a metric using equity and bond market yields as a quantitative leading indicator of when a payout-rate change might be important to discuss. The quantitative approach he developed may be useful input to the ongoing debate, which also includes strategic and moral issues.

Another ongoing contentious issue in the sector is the tension between local and national funders. Too often, local funders see national foundations who want to support work in communities but don't value the experiences of long-term local funders. **Carcedo, Davis, Folkerth, Grubstein, and Kabel** explore how The BUILD Health Challenge® was created and how it 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.

Ellis, Pinsonneault, Deering, Ehrenfeld, Fabian, and Maurana describe how the Medical College of Wisconsin's Advancing a Healthier Wisconsin Endowment shifted 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. The endowment works to translate new knowledge from national thought leaders and align it with its own experiences to guide the endowment's work.

Gillespie draws attention to an area that is poorly understood — how foundations are fostering economic security for women. She explores the work of Prosperity Together, a coalition of 30 women's grantmaking funds dedicated to advancing women's economic security. The author argues that aligning the work with research recommendations is critical.

Jaquith and Chavez share 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. The focus on supporting the technical assistance providers helped to better coordinate services and support greater impact.

In another article focused on learning, **Lewis-Charp, Berman, Lench, and Siddall** share 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. The project's model and approach are grounded in the core design elements of a field-facing learning agenda, grantmaking that leads with learning, collective leadership, and peer learning among grantees.

There has been increasing interest in limited-life foundations, with one argument in favor that as context changes, perpetual foundations are limited by the intent of the original donor and unable to be as responsive as needed. **Mansson** explores this issue and other benefits and challenges of leading a foundation that is nearing the end of its life.

Effective grantmaking requires understanding the bigger picture — whether it is the status of overall financial markets, the presence of other actors in the geographic area, or the status of research on an issue. We hope these articles encourage you to consider how you engage in context.



Teresa R. Behrens, Ph.D.
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at Grand Valley State University

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Philanthropy is evolving quickly. Learning curves do not have to get in the way of your impact. We can help you navigate the changing field with research, knowledge, and training tailored to your needs. If you want to advance your career, strengthen your organization's future, or improve the effectiveness of your giving, we can help.

Our programs are designed to meet the learning needs of grantmakers and donors: ***The Foundation Review***, **The Grantmaking School**, **LearnPhilanthropy.org**, **OurStateofGenerosity.org**, the **Frey Foundation Chair for Family Philanthropy**, and the **W.K. Kellogg Community Philanthropy Chair**.

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