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Executive Summaries

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Executive Summaries

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Advancing Philanthropic Strategy Through Evaluative Thinking: One Foundation's Approach

Christine B. Baker, Ph.D., and Margaret Eigsti, M.S.W., Sisters of Charity Foundation of Cleveland; Kathryn Racine, M.Div., and Laurence J. O'Connell, Ph.D., S.T.D., MLC Group

This article explores the use of theory of change as a tool for managing a strategic shift and leadership or generational change. Sisters of Charity Foundation of Cleveland's Catholic Sisters Program Area used a three-part evaluation designed to offer an inclusive, systems-based approach by identifying outcomes critical to CSPA success and salient areas of evaluative inquiry. This approach was used to strengthen the program areas; develop a framework of key elements of gospel-inspired service as modeled by sisters, rooted in stakeholder and community input; and to develop measurement tools for sisters and lay partners for ongoing data collection to strengthen existing efforts and plan for the future. This approach may be more broadly applied by social justice, family, or other foundations rooted in legacy, history, and tradition.

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Learning as We Go: How Emergent Process Supports Sustainable Community and Philanthropic Change

Elizabeth Myrick, M.A., Elizabeth Myrick Consulting; Rachel Mosher-Williams, M.P.A., RMW Consulting Group; and Laurie Zierer, M.A., PA Humanities

In 2019-2020, the PA Heart & Soul Learning Project sought greater clarity about the direct experience of participants in a humanities-driven community planning pilot in three Pennsylvania locations. The Learning Project concluded that an emergence-focused and humanities-driven approach can produce sustainable community plans informed by resident voices, particularly those who have been historically marginalized. Perhaps more important, allowing emergent learning to shape strategy led to stronger engagement by residents, improved funder–community relationships, and new ways of showing up for PA Humanities and its partners. This article presents researchers' findings about the impact of the model; describes how PA Humanities, a nonprofit partner of the National Endowment of the Humanities, is reformulating its community-building strategy based on these findings; and explores potential lessons for place-based grantmakers seeking inclusive, people-centered community change.

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Engaging Community to Build a Community Dashboard

Tanya Upthegrove Gregory, M.B.A., Ruth Mott Foundation, and Liz Gordillo, M.S.W., Ralph C. Wilson, Jr. Foundation

In 2016, the Ruth Mott Foundation embarked upon a five-year strategic plan aimed at improving the quality of life for residents of north Flint. As a place-based grantmaker, the foundation uses community-level data internally to establish baseline data. The North Flint Community Dashboard was developed as a practical tool to support decision-making, develop a common understanding of progress, and build mutual accountability with the community related to the foundation's priority areas of youth, public safety, economic opportunity, and neighborhoods. The dashboard is used by program staff and potential grantees around grantmaking. As the dashboard approaches its sixth year of implementation, the foundation is monitoring community indicators and any identified trends since the inception of the strategic plan. This information, coupled with aggregated data derived from grantee reports, show changes to community conditions over time within each of the indicators aligned with the strategic plan that are tracked on the dashboard. Dashboard data will also provide foundation staff and trustees with needed context to inform strategic direction beyond the current strategic plan time frame.

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Media Relations Strategies of Philanthropic Foundations: A Longitudinal Analysis of News Releases Produced by Top U.S. Foundations

Richard D. Waters, Ph.D., University of San Francisco; Giselle A. Auger, Ph.D., Rhode Island College; and Kelly M. Husted, M.S., M.P.A., University of Washington

Agenda-setting theory highlights the critical role of organizations in bringing change issues to the attention of the media and, therefore, the public. This article uses content analysis to compare two sets of a random sample of news releases from 20 of the largest foundations in the United States. Results indicate that foundations are designing news releases more as tools of self-promotion than as the objective sources of new information that are useful to journalists. These results helped shape a list of seven practices for foundations to use in developing more effective approaches to media engagement, and have opened new possibilities for research into how philanthropy can use communications to create positive social change.

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The Soft Stuff Doesn't Have to be Hard: Foundation Investments in Grantee Workers are Necessary, Valuable, and Measurable

Rusty M. Stahl, M.A., Fund the People

There is an urgent need for funder investments in the ability of grantee nonprofit organizations to support their staff. Such investments, when done well, can yield significant value for individuals, organizations, and fields of work or movements. Furthermore, the value of these investments can be evaluated and communicated. This article explores the reasons for and implications of the inadequate response by funders, offers a path forward for designing investments in grantee staff, and documents how funders can capture and communicate the value of these “talent investments.” Powerful myths serve as barriers to widespread funder investment in grantee staff, and the resulting environment is significantly harmful to wellness, morale, productivity, and equity for organizations and professionals in the social sector. One of these myths that has gone unchallenged is the assumption that it is impossible to assess how investments in grantee staff lead to greater social impact. This article introduces a framework for “talent investing,” and offers examples of how funders have documented and assessed the impact of well-constructed talent investments.

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The Yin and Yang of Equity-Centered Philanthropy

Douglas Easterling, Ph.D., Laura McDuffee, M.P.A., and Sabina B. Gesell, Ph.D., Wake Forest School of Medicine

Foundations face two competing imperatives when they commit to advancing equity. On the one hand, they are counseled to support and follow the lead of community-based groups that are on the front lines of social change. On the other hand, they are also being challenged to use their power and influence to act boldly to change inequitable structures, policies, and institutions. These two orientations, yin and yang, can take a foundation in different directions and thus cause confusion and internal conflict. The challenge for a foundation is to balance and integrate the two orientations into a comprehensive and effective approach to advancing equity. Drawing on the experience of six foundations that have embraced equity, the authors provide guidance on how to manage the yin–yang polarity. They argue that foundation staff need to bring both a yin and a yang orientation when engaging with grantees. Strong working partnerships with open, honest, give-and-take conversations allow for reciprocal learning and collective strategizing, which in turn sets the stage for innovative, breakthrough solutions.

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In Defence of Philanthropy

Book Review by Nabih Haddad

Philanthropy has long been a target of criticism — it is seen as a practice of plutocratic influence, ineffective in promoting actual social change, and doing more harm than good. All are arguments that many scholars, thought leaders, journalists, and varying stakeholders make today, as outlined by Beth Breeze in *In Defence of Philanthropy*. The co-founder and Director of the Centre for Philanthropy at the University of Kent, Breeze understands philanthropy as a solicitor and as a scholar who knows the debates within the field. Breeze gauges the argumentative tenor of philanthropy, offers readers salient points in these debates, and makes clear her take on the issues. Breeze categorizes criticisms as academic, insider, and populist critiques, and details several ways for the philanthropic sector to address them and make improvements. More ethical philanthropy, for example, includes drawing on social justice, racial justice, and environmental justice notions in granting portfolios, examining and paying attention to power dynamics, expanding transparency and collaborations, being more effective in giving by leveraging expertise, using evaluations, more trust-based philanthropy, and unrestricted philanthropic funding.

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