

# The Foundation Review

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## Executive Summaries

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# Executive Summaries

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## Systems-Change Philanthropy: It's Essential, and It's Our Responsibility

Emily Bhandari, M.P.Aff., M.S.SW., Alison Mohr Boleware, L.M.S.SW., and Octavio N. Martinez Jr., M.D., M.P.H., M.B.A., F.A.P.A., Hogg Foundation for Mental Health

The Texas mental health and substance use policy community is limited in size, capacity, and training. To address that reality, the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative was launched to invest in supporting community organizations to employ and mentor full-time policy fellows. A retrospective evaluation shows an increase in peer and recovery services, deepened policy fellows' understanding of and ability to navigate the policy arena, and increased capacity of community organizations for effective policy engagement.

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## Community Building as a Philosophy, Not an Initiative

Anne Kubisch, M.P.I.A., Kasi Allen, Ph.D., and Max Gimbel, M.A., The Ford Family Foundation

The Ford Family Foundation, a rural embedded funder in southern Oregon, has a 10-year strategic plan focused on helping rural communities build the futures that they want. The foundation's community building philosophy is represented by the bilingual Community Building Approach Wheel, a framework and language created by convening a cross-section of rural leaders as working teams to describe community-building principles and practices. This article shares learnings from The Ford Family Foundation's experience of becoming a community-building organization, the difference it has made, and some of the pitfalls it encountered and how the foundation responded.

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## How Foundations in an Aligned-Action Network Start to Move to Equity in Philanthropy: Findings from a Year of Observations and Interviews

Jamie Levine Daniel, Ph.D., New York University; Tuyen K. Dinh, M.S., and Laurie Paarlberg, Ph.D., Indiana University Indianapolis

Using data from interviews with foundation staff, network meeting observations, and network documents, the authors describe how community foundations define equity; what structures, processes, and activities were perceived as supporting their equity-related work; and how membership in Network for Equity + Opportunity Nationwide can help highlight these efforts. Findings illuminate a model of philanthropic efforts along two dimensions: foundation focus (internal and external) and expression type (implicit and explicit). This article offers insights to better understand expectations and prepare for the conditions necessary to meaningfully engage in social equity and justice efforts.

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## From Philanthropoid to Foundation Professional: Reflecting on a Century of Staff Role Development in U.S. Private Foundations

Michele Fugiel Gartner, Ph.D., Tobias Jung, Ph.D., and Alina Baluch, Ph.D., University of St Andrews, Centre for the Study of Philanthropy & Public Good

Little attention has been given to foundations' internal dynamics and how the roles of foundation staff have developed and evolved over time. This article maps and synthesizes research on the impact of philanthropic events on role evolution, demonstrating a movement from amateur traditions to emerging professional influences. Four areas of inquiry are presented for foundation practitioners and associations to explore: expertise, training, competencies, and policies.

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## Exploring Flexibility in Philanthropic Funding for Place-Based Efforts to Improve Community Health: Reflections on a New York State Multisite Initiative

Beth C. Weitzman, Ph.D., and Courtney Abrams, M.A., New York University; Bronwyn Starr, M.P.H., New York Health Foundation; Irfan Hasan, M.P.A., The New York Community Trust; and Amy Shire, Brian Elbel, and Carolyn Berry, New York University

This article shares insights and reflections from an experience funding and evaluating the Healthy Neighborhoods Initiative, a \$22 million, six-year, place-based effort by two grantmaking foundations across nine diverse communities in New York state. An external, mixed methods evaluation provided feedback to the funders on achievements, challenges, and learnings. Local partnership structures building on existing relationships and those that had or could quickly build trust of key actors and community residents were more effective at sustaining strategic activities and engagement. While working at the community level had many benefits, it was difficult to leverage strategies to create policy changes at the city or state level.

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## *Changing Systems, Changing Lives: Reflecting on 20 Years*

Book review by Kennedy Musyoka, M.B.A., Emily Irungu, M.B.A., and Margaret F. Sloan, Ph.D., James Madison University

The Nicholson Foundation during its 20-year history of pursuing systems-level change for vulnerable populations. Spearheaded by Jan Nicholson, president of the Foundation's board of trustees, and board chair Barbara Nicholson McFadyen, the book presents the major initiatives of the Foundation from its creation in 2002 to the sunset of its activities in 2021. By exploring key successes, the book offers a model for both effective community engagement and the thoughtful and purposeful closure of a foundation. *Changing Systems, Changing Lives* offers vital lessons in how to bring forth sustainable impact while operating in a volatile, uncertain, complex, and ambiguous world. The authors also encourage a paradigm shift among foundations — from an in-perpetuity model to one of high-impact investing and the intentional spending down of assets — and show how The Nicholson Foundation accomplished that transition.

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