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## Executive Summaries

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# executive summaries

## Results

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### The Legacy of a Philanthropic Exit: Lessons from the Evaluation of the Hewlett Foundation’s Nuclear Security Initiative

*Anne Gienapp, M.P.A., and Jane Reisman, Ph.D., ORS Impact; and David Shorr, M.P.A., and Amy Arbretton, Ph.D., William and Flora Hewlett Foundation*

Although time-bound philanthropic initiatives are a well-established practice, there is still much to learn about effective ways to implement, evaluate, and wind down these types of investments. This article describes the NSI evaluation, how the findings informed Hewlett’s philanthropic approach, and provides a case example of a philanthropic-initiative exit. Key considerations for monitoring and evaluation practices particular to the context of a planned exit are discussed.

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### Partnership With Government: An Exit Strategy for Philanthropies?

*Colin Knox, Ph.D., Nazarbayev University and Ulster University, and Padraic Quirk, Ph.D., Social Change Initiative*

Atlantic Philanthropies’ work in Northern Ireland supported three thematic intervention areas: aging; children and young people; and reconciliation and human rights. Its exit strategy has involved a formal partnership arrangement with the Northern Ireland Assembly to take external interventions to scale and mainstream services previously funded through NGOs. This article draws on qualitative data gathered through interviews with key stakeholders — the funder, government officials, and NGOs — and considers the consequences of this approach. It also offers specific and general lessons on partnering with government as an exit strategy.

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## Tools

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### Evaluation at Sunset: Considerations When Evaluating a Program as It Concludes

*Blair Beadnell, Ph.D., Holly Carmichael Djang, M.A., Jan Vanslyke, Ph.D., and Tatiana Masters, Ph.D., Evaluation Specialists; and Barbara Andersen, M.P.A., Santa Barbara Foundation*

While the benefits of beginning evaluation efforts at a program's inception are well known, for a variety of reasons many organizations are unable to do so and instead begin these efforts closer to a program's conclusion. A sunset evaluation of the Orfalea Foundation's School Food Initiative showed positive outcomes and provided recommendations for organizations interested in similar efforts. Because the evaluation was begun as the foundation was spending down, it required creative design approaches. This article uses the evaluation as a case example of a rigorous and useful sunset evaluation, and discusses other possible extensions of these methods.

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## Sector

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### Breaking Up Is Hard to Do

*Barbara Kibbe, J.D., S. D. Bechtel, Jr. Foundation*

Funding relationships begin, and they end. Yet little is known about the effects of foundation exits on the work, the grantees, and the related fields. This article draws on interviews with funders and grantees involved in more than a dozen exits to fill the gaps in what is known about how to exit well. The article discusses four areas where foundation exits present particular challenges and where there are significant opportunities to improve practice — deciding on and planning to exit, funder leadership, clear communication, and final grants — and includes summaries of advice from funder and grantee perspectives.

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### Exiting From Large-Scale Initiatives: Lessons and Insights From a National Scan of Philanthropy

*Hanh Cao Yu, Ph.D., and Moninder-Mona K. Jhavar, M.P.H., The California Endowment, and Daniela Berman, M.P.P., Social Policy Research Associates*

This article shares insights and lessons from a research project commissioned by The California Endowment in early 2016 to inform the planning for its transition out of Building Healthy Communities. A guiding framework for exit and sustainability planning is presented as a set of recommendations that relate to issues such as managing relationships between funder and grantee partners during the exit, using the initiative's theory of change as a tool for decision-making, finding a balance between demonstrable success and equity, and managing the internal processes of the funding organization.

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## Reflective Practice

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### End-Game Evaluation: Building A Legacy Of Learning In A Limited-Life Foundation

*Ashleigh Halverstadt, M.P.A., S. D. Bechtel, Jr. Foundation, and Benjamin Kerman, Ph.D., The Atlantic Philanthropies*

Few, if any, of the problems philanthropy seeks to address can be solved within a brief, defined time frame. Limited-life foundations can only strive to move the ball down the field before they sunset, and then enlist others to carry the work forward. This article shares the emerging hypotheses of two foundations, The Atlantic Philanthropies and the S. D. Bechtel, Jr. Foundation — each four years from sunset — about the opportunities and challenges for evaluation in the limited-life context. The article argues that systematically capturing and sharing knowledge — about programs, as well as social-change methods and grantmaking practices — can increase a foundation's influence and impact during its final years and beyond.

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### Changing in Place: The Skillman Foundation, Detroit, and the Good Neighborhoods Initiative

*How did a hometown grantmaker conduct and conclude its largest-ever initiative?*

In 2006, the Skillman Foundation committed \$100 million to a decade-long investment in six neighborhoods. Along the way, the foundation reset its strategy and sharpened its goal — in response to seismic shifts in the local context and informed by indicators of progress. To capture information on the unique challenges facing an embedded funder as it changes program direction, Bob Tobin, senior consultant at Williams Group, interviewed Marie Colombo, Skillman Foundation director for strategic evaluation and learning.

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## Commentary

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### Exiting is a Natural Part of Philanthropy — Learning From it? Not so Much.

*Debra Joy Perez, Ph.D.*

The author shares personal reflections on what makes exiting from long-term philanthropic investments so challenging.

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