

A nighttime photograph of a city skyline, likely Boston, viewed from across a body of water. The buildings are illuminated with lights, and the sky is dark with some clouds. The water in the foreground is dark and reflects some of the city lights.

**Changing the Game:**  
Civic Leadership at  
The Boston Foundation, 2001–2012

Paul S. Grogan

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*Duke Essays in Contemporary Philanthropy #2*



CENTER FOR STRATEGIC PHILANTHROPY  
AND CIVIL SOCIETY

SANFORD SCHOOL OF PUBLIC POLICY

DUKE UNIVERSITY

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## Introduction

We're about to begin the second century of philanthropic giving by community foundations. Started in Cleveland in 1914, they now number more than 700 institutions domestically. They are linked and distinguished by a unique, place-based, community-engaged approach to philanthropy. Their targets are local. Their efforts are continuously informed by local developments. At their best, they are involved in a locale's nearly every important civic venture.

Several months ago I asked Paul Grogan, the President and CEO of The Boston Foundation, as well as a good friend, to reflect on recent developments in philanthropy and highlight the compelling strengths of community foundations as seen from his perch. Paul's arrival at TBF more than a decade ago had ushered in a transformation in how the Foundation did its business. TBF now acts in a very different manner than under its predecessor. In research, analysis, policy advocacy, communications, outreach, and numerous other clusters of its work, the changes have been planned, organic, and effective. Today there is universal agreement that TBF is one of the most effective foundations in the country.

Paul's story is also a personal one of leadership, both institutional and individual. We can see examples of growth and maturation. He describes a decade of changes and the results the changes produced.

It is a very important story, and not only for Bostonians. Many of the institutional and programmatic strategies devised and encouraged by TBF are available to other funders -- adapted, of course, to their local situations. The description shows how con-

temporary community foundations can become more agile, energized, relevant, and, not least, consequential in their communities. As we enter the second decade of a new century, this essay offers a rough guide for foundations willing to intentionally take up the challenges of staying relevant and forging positive social change.

*Changing the Game* is the second in a series of occasional essays published by the Center. (The first was titled *Disrupting Philanthropy: Technology and the Future of the Social Sector*, whose lead author is Lucy Bernholz of Stanford University.) I am the General Editor of the series, along with Barry Varela of the Center's staff. Please do let us have your feedback on this essay and send along ideas for topics of high import that should be addressed.

*Edward Skloot*

DIRECTOR

CENTER FOR STRATEGIC PHILANTHROPY AND CIVIL SOCIETY

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## Changing the Game:

# Civic Leadership at the Boston Foundation

The first community foundation, the Cleveland Foundation, was founded in 1914 by a visionary lawyer and banker, Frederick Goff. Thanks in part to Goff's proselytizing, eight more community foundations were started the next year, including one in Boston. Community foundations were part of a wave of social innovation as America tried to cope with the wrenching change of the late nineteenth and early twentieth centuries. The country was industrializing rapidly and becoming, for the first time, an urban nation. Torrents of immigrants, about whom many Americans were ambivalent, were pouring in. Big city problems were appearing in the United States for the first time: public health challenges, the breakdown of families, rising crime, spreading slums, horrific conditions in burgeoning factories. The social inventions that took hold and expanded during this period were society's attempt to cope: YMCAs, settlement houses, Boys Clubs, and the passage of compulsory education laws for the first time were some of the other responses.

The original idea of community foundations was to pool charitable resources in order to permit a focused effort on underlying causes. Charity, in this conception, would be more than a mere palliative (that dealt only with the symptoms of distress). In



## The Boston Foundation



## There at the Beginning

the case of the Boston Foundation, the founders were a pair of enlightened trust officers at the Boston Safe Deposit and Trust (now part of the Bank of New York Mellon). They were articulate about the need to attack the underlying causes of urban problems, and that need has been the organizing principle of the Boston Foundation ever since.

Like the other innovations of this period, community foundations have proved to be quite durable. There are more than

700 across the United States with over \$55 billion in assets<sup>1</sup> and an equal number around the world, comprising a very robust branch of philanthropy. Community foundations are appealing in part because, in an increasingly global and rootless world, they are “place-based.” Most community foundations have fancy mission statements, but here at the Boston Foundation it boils down to trying to make Greater Boston a better place. Most human beings are attached to a place, often passionately, and institutions that are grounded in a place can arouse substantial support and loyalty.

**All community foundations have fancy mission statements, but here at the Boston Foundation it boils down to trying to make Greater Boston a better place.**

For much of their history, most community foundations, including the Boston Foundation, have confined themselves to two primary sets of activities. The first is the enlargement and stewardship of philanthropic assets on behalf of the community. The Boston Foundation offers its facilities and resources to donors, families, individuals, and institutions who would like to take advantage of the Foundation’s capacities in conducting their own philanthropy whether through donor-advised funds or other vehicles.

The second is to act as a major grantmaker in the community and a supporter of vital nonprofits. In any given year, the Boston Foundation and its donors make between seventy and ninety million dollars in grants. We are, by far, the largest grant maker in New England, and most funding goes to nonprofits in Greater Boston. As of 2012, the Boston Foundation had assembled net assets of about \$850 million, of which about \$300 million (mostly from bequests) is unrestricted, permitting a flexible grantmaking program that the Foundation can direct in various ways of its own choosing.

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1. Key Facts about Community Foundations, The Foundation Center, 2012. <[http://foundationcenter.org/gainknowledge/research/pdf/keyfacts\\_comm2012.pdf](http://foundationcenter.org/gainknowledge/research/pdf/keyfacts_comm2012.pdf)>



The Boston Foundation has enjoyed a sterling reputation as a shrewd and prescient grantmaker over many decades. This was of considerable interest when I joined the Foundation in 2001. I wanted to know the most important things the Foundation had invested in. I knew that most foundations, including many community foundations, are generally risk averse and would far prefer to support tried and true programs and organizations.

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What we learned from looking at the history of the Boston Foundation was that it had, from the beginning, been receptive to new ideas and risk.

In its openness to new ideas, the Boston Foundation aligned itself with one of the fundamental positive attributes of Greater Boston. With eight research universities among 70 plus colleges and universities, Boston is a very innovative place. The hundreds of thousands of talented students, professors, and researchers push innovation in business, science, medicine, politics, and so on. And a portion of this talent has always been interested in *social* innovation. Public television was born in Boston in WGBH, with seed capital provided by the Boston Foundation. Neighborhood health centers, also supported by the Boston Foundation, are splendid examples of a health care innovation that revolutionized primary care in Boston. Community development corporations (CDCs) and community development intermediaries made Boston a premier city for neighborhood revitalization in the 1980s and 1990s. The cleanup the Boston Harbor, in the early 1980s, then one of the most polluted harbors in the country, was triggered by several zealous advocacy organizations with the Boston Foundation's timely support. Those organizations pushed, prodded, and litigated (with litigation funded by the Boston Foundation) state and federal authorities to own up to their responsibilities, and

the result was a clean harbor. An initially quixotic idea ended up being a \$4.4 billion environmental and economic landmark. This, and many other often-transformational philanthropic

**About twelve years ago the board asked itself a hard question: Is the Boston Foundation all it can be?**

investments, made for an enviable track record.

But despite this history, the Foundation's board of directors was not satisfied. About twelve

years ago, as the Foundation was contemplating the retirement of my predecessor, Anna Faith Jones, the board asked itself a hard question: Is the Boston Foundation all it can be?

One thing that freed the board to ask this question was a dramatic structural change Ms. Jones had engineered. The Boston Foundation was founded as a trust, and for most of its history was governed by a small and relatively unrepresentative board composed of officials appointed by the various banks that controlled part of the Foundation's assets, as well as a few public officials such as the state attorney general. Anna Faith Jones convinced the banks to give up control, making the case that the city would be better served by a community foundation with independent governance and the ability to craft its own investment program. Her efforts were aided by a scathing column in *The Boston Globe* on the poor returns the trust banks were getting on the Foundation's money.

As part of the governance restructuring, the Boston Foundation gained the ability to appoint its own board, which enabled the creation of a larger, far more representative body. Today membership includes heads of large and mid-sized nonprofits, local philanthropists, college presidents, lawyers, financial and investment managers, and media and community leaders.

When the board came to consider the leadership change, it was from a position of deep community knowledge, influence, and the freedom to be innovative. Aided by outside consultants,

it conducted its own strategic review of the Foundation's record. The answer to the difficult question of whether the Foundation was all it could be was a resounding "no." Ira Jackson, Chair of the Program Committee, described the board's motivation this way:

We tried to think creatively and critically, as only this sort of transition lets you do. . . . It was evident that we were treading water. We were too invisible, polite, too traditional and "that's the way it always has been." We were doing good work, but not great.<sup>2</sup>

A major theme in the Board's deliberation was the precipitous decline in civic and business leadership in Boston. The business community had become less visible and influential, a byproduct of the national trend of mergers and acquisitions. As major companies consolidated to form even larger, often multinational organizations, their success was no longer tied to the success of a particular city, and their role as community fixtures and anchor institutions declined. Boston saw FleetBoston Financial purchased by Bank of America, John Hancock Financial Services by ManuLife Financial, and Gillette by Procter & Gamble. Such acquisitions leave vacancies in leadership and in philanthropic capital. In the 1990s, the Catholic Church, for generations a source of social cohesion and stability in Boston, was revealed as having a hierarchy who knowingly harbored sex criminals. The child sex abuse scandal severely undermined the Church's credibility as a force for civic good.

Facing this leadership vacuum, the board of directors thought, "Why not the Boston Foundation?" As a permanent, prestigious organization with substantial resources, devoted to the welfare of the community, could the Boston Foundation be, if not *the* answer to declining leadership, at least *part* of the answer? At

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2. Jackson, Ira. Personal Interview by NL Parker. 21 March 2012.

that time, the first years of the new millennium, no one would have described the Boston Foundation as a leadership institution, despite the good standing of the Foundation and its many

**In charting a new, more public course, the board knew that selecting the right leader would be a crucial first step.**

successes. The board saw that the Foundation, as a quiet, behind-the-scenes institution that conducted its work largely out of public view, was “leaving a lot on the table.” Its grantmaking

did many wonderful things, but it was not moving the city decisively in one direction or another.

In charting a new, more public course, the board knew that selecting the right leader would be a crucial first step. As board member Ira Jackson describes it:

We thought about what the new order of Foundation leadership would be like. What would be the principal functions of new leaders? What does our selection of a new leader say about the substance and style of a new Boston Foundation?<sup>3</sup>

The board felt that the new leader would need to be externally oriented; would have to be willing to delegate some of the management of the complex organization in order to be free to be an active leader in the community; would need to have experience and comfort with the public sector; and would have to have the diplomatic skills to manage a more public Foundation without allowing it to become politicized.

As the individual chosen to lead the Foundation into a new era, I was particularly fortunate in two respects. First, the fact that the desire to change—and enlarge—the role of the Foundation came from the *board* meant that staff did not have to expend its energies trying to persuade a reluctant leadership. Second, the

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3. Jackson, Ira. Personal Interview by NL Parker. 21 March 2012.





board was not prescriptive. After laying out a broad and ambitious vision for change, management was left with the flexibility to decide what that would mean in practice.

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The first thing looked at was whether the Foundation had the organizational capacity and the people to do the kind of public-oriented work the board envisioned. We did not. For example, there was little in the way of public affairs capacity: just one individual responding to press inquiries and a part-time writer responsible for the Foundation's publications. To build an integrated public affairs unit within the Foundation that would drive the process of change, the Foundation engaged an accomplished journalist and newspaper executive, Mary Jo Meisner. She was looking for her next move following a successful career in newspapers that included stints as city editor of the *Washington Post*, editor of the *Milwaukee Journal Sentinel*, and editor and vice chairman of a chain of newspapers based in Boston. She now leads a new department within the Boston Foundation: Communications, Public Relations, and External Affairs. As these functions have grown, so has the department, which now includes eight specialists in press, government relations, communications, and marketing, in addition to research staff. The foundation's total staff has grown from 42 in 2000 to 62 in 2010 and 92 today, in 2012.

Many community foundations find it daunting to move in this direction because they do not have the staff capacity either. But if the role of an institution changes, staff must change as well. Perhaps one of the few upsides to the collapse of print journalism is the plethora of talent available to do communications at places like community foundations.

## Components of Civic Leadership

### at the Boston Foundation

With this new capacity, the Foundation went through a process of mapping out what an externally oriented focus might mean for the Boston Foundation. During the hiring process, the direction of the Foundation was clear, but it wasn't until the team was assembled that a specific approach could be articulated. At a meeting with the board just three months after I began at the Foundation on July 1st, 2001, we laid out a plan based on taking on a set of new distinct but related functions: data and research, forums, public affairs and media, and serial mobilizations and convenings. Of course, there have been adjustments along the way, but overall there has been fidelity to this original blueprint.

In effect, the Boston Foundation has become a think tank joined to a grant making institution, and the data and research produced by the think-tank part of the Foundation has allowed the region to have unusually rigorous and intelligent conversations. When everyone is looking at the same information, the conversation is more productive and ideological boundaries are less pronounced.

New York City Mayor Bloomberg frequently notes, "In God we trust. Everyone else: bring data," and that's a good summary of the mentality now in Boston. The Boston Foundation has gradually become the go-to place for research, and that has provided legitimacy to take public stances on controversial issues. Rather than stepping forward with a position out of the blue, research justifies the organization's interest and backs up its claims.

Providing data and research and the benefits that go along with them describe why community foundations are so well suited to play a leadership role. Like local newspapers, community foundations are place-based institutions; tuned in to the unique needs,

cultures, and interests of the areas they serve. Community foundations are independent and nonpartisan observers, able to produce objective research and work with a diverse range of partners. There is a serious mission-based argument, well and simply articulated by Alberto Ibargüen, the head of the Knight Foundation, which has been very supportive of community foundations across the nation:

Community foundations were created to meet the core needs of communities. In a democracy, information is a core need.<sup>4</sup>

The Boston Foundation's entrance into data, research, and civic leadership was based on the Boston Indicators Project, which was one of the first civic indicators projects in the country. The project was launched in the 1990s, in partnership with the city's redevelopment agency and the Metropolitan Area Planning Council. It is a huge research effort that collects and synthesizes data and information gathered by a wide variety of civic institutions, public agencies, academic think tanks, community-based organizations, and individuals. In addition to sharing the data, the Foundation synthesizes and publishes key findings and trends in hard copy, on the web, and in conferences and forums. The tremendous amount of information provided by the Boston Indicators Project provides the confidence and legitimacy to play a more public role.

The Foundation also began to commission significant additional research, to extend our ability to look in-depth at key issues and challenges. This was enabled by the emergence within the last decade of a profusion of locally oriented think tanks in Boston. Previously, there were individual professors at individual institutions who occasionally studied local problems, but university-based teams focused primarily and regularly on local and regional issues is a recent development. Researchers at

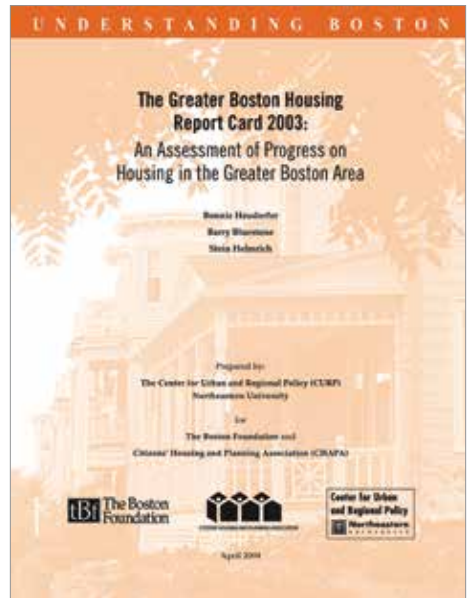
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4. Ibargüen, Alberto. "Knight Foundation's Media Innovation Strategy." Information in the Digital Age. The Boston Foundation. 75 Arlington Street, Boston. 10 2008. Speech

Harvard University, Northeastern University, and the University of Massachusetts study not only global phenomena but also what is happening in the neighborhoods of the city. Boston is also home to an independent think tank that does high-quality work, MassINC.

In the early 2000s, as the Boston Foundation ramped up its own research efforts, we were able to harness this network of local think tanks. Spending on research from the Boston Indicators Project and through outside institutions increased from roughly \$100,000 in fiscal year 2001 to \$615,000 in fiscal year 2012. Most of that funding was provided by discretionary grant-making dollars at the Foundation. In the fiscal year 2012, research accounts for nearly 4% of all of discretionary grants. In fact, the shift was quite sudden; discretionary grants for data and research grew from less than 1% to approximately 3.5% from fiscal year 2001 to fiscal year 2002, the year we made the change.

Over the years, we've learned a lot about how to use our research capacity most effectively. One of the earliest reports, *The Greater Boston Housing Report Card 2002*<sup>5</sup>, described housing production, trends in housing prices and rents, the preservation of affordable housing, and Massachusetts funding levels for subsidized housing. It was the first in a series released annually, keeping the conversation about our housing needs and challenges current. The commitment to the



5. Allen, Ryan, Barry Bluestone, Bonnie Heudorfer, and Gretchen Weismann. *The Greater Boston Housing Report Card 2002*. Dukakis Center Publications, 2002. Print.



*Report Card* allows the Foundation to play the role of monitor, which we have found to be very effective and have since replicated with “report cards” in other areas like education and health. In the case of housing, the report card led directly to the passage of major “smart growth” housing legislation in 2004.

One significant issue confronting the city was the cost of healthcare. The Boston Foundation kept up an unrelenting and persistent stream of reports showing how the cost of municipal employees’ healthcare had become unsustainable. Each of these reports furthered public understanding and dialogue. Reports looked at tools available for municipal officials to moderate healthcare costs, at the benefits and limitations of moving municipal

healthcare plans to the state-run Group Insurance Commission, and at the rising cost of municipal plans in relation to state and federal plans. The most influential report in this area, however, related the cost of municipal healthcare costs to education funding. *School Funding Reality: A Bargain Not Kept*<sup>6</sup>, showed that new money the legislature had voted for education over a decade had been completely consumed instead, and then some, by rising health care premiums for teachers and other public employees. This report led to major reform in municipal healthcare in Massachusetts just six months later in 2011, over the strenuous objections of organized labor. Stephen Kulik, Vice Chairman of the House Committee on Ways and Means, said:

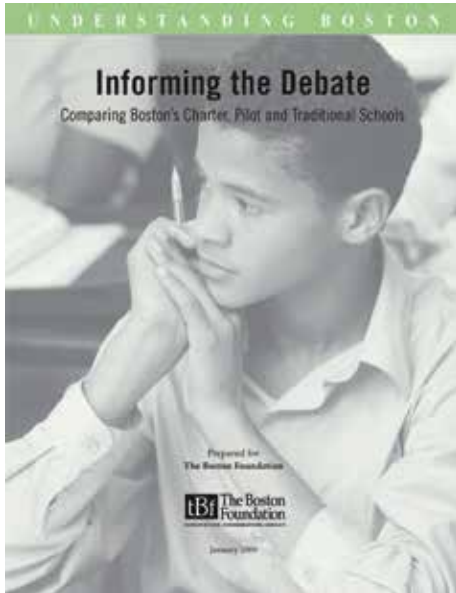
**The Boston Foundation's municipal healthcare report turned heads with its detailed dollar figures. It was a game changer.**

The Boston Foundation's municipal healthcare report turned heads with its detailed dollar figures. It was a game changer.<sup>7</sup>

*School Funding Reality* demonstrates another key element of our reports: reporting statistics that will catch the public's attention through innovative research or by making connections between issues. This tactic can lead to the softening of entrenched positions, bringing new players to the table and opening up new conversations. Another report, discussed in more detail below, broke the stalemate around charter schools with a study designed to eliminate some aspects of "selection bias," one of the key criticisms of research on charter school results. Taking advantage of the natural experiment embodied in Massachusetts's over subscribed charter lotteries, *Informing the Debate: Comparing Boston's Charter, Pilot and*

6. Moscovitch, Edward. *School Funding Reality: A Bargain Not Kept*. Boston, MA: The Boston Foundation, 2010. Print.

7. "Municipal Health Care Reform: More than \$178 Million Saved to Date." TBF News Special Issue Summer 2012 Volume II: 5.



*Traditional Schools*<sup>8</sup>, showed large and significant positive effects of charter middle and high schools on student achievement. The report helped to convince Boston Mayor Tom Menino and Governor Deval Patrick to drop their opposition to establishing more charter schools.

We are all familiar with very good research that just ends up on the shelf. We wanted ours to be actionable, and for that we needed a distribution system. Reports are disseminated

through a series of public forums, attended by public, private, and nonprofit sector leaders, under the umbrella concept “Understanding Boston.” The Foundation hosts anywhere from 12 to 15 major forums at the Boston Foundation every year, and most of them are packed, spilling over into additional rooms with simulcasts of the program. From the start it was important to us that these forums bring out people in positions of authority. Now, if the Foundation hosts a forum on an education topic, for example, it will be attended by people like the Boston Public Schools superintendent, the state’s commissioner of education, and sometimes even the mayor or the governor.

One concern was whether these forums would be well received and well attended. What if we threw a party and no one came? Ultimately, success came from our reputation as a neutral convener. Of course, in reality the Foundation often has

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8. Abdulkadiroglu A, Angrist J, Cohodes S, Dynarski S, Fullerton J, Kane T, Pathak P. *Informing the Debate: Comparing Boston's Charter, Pilot and Traditional Schools*. Boston, MA: The Boston Foundation; 2009. Print.

a point of view, but by hosting conversations that include a wide variety of opinions, we have largely avoided being seen as having an axe to grind.

Most importantly, there was a real hunger in the community for access to data and research and for the kinds of substantial conversations that take place at Understanding Boston forums. It helps to have a wide range of influential panelists to comment on a given report's findings and encouraging discussion that is relevant, interesting, and newsworthy. These forums present an opportunity for professionals working on similar issues to network and consider the implications of the report's findings on their work. These are exactly the sort of connections and discussions a community foundation can provide to the community.

Along with research and public forums, the Foundation has made a concerted effort to be very visible in the media and the community. When the board was first discussing changes at the Foundation, one of the directors said,

If we want to attract resources and we want to be influential, just exactly how does it help us that no one knows who we are or what we're doing?<sup>9</sup>

It is admirable to do good quietly, but our Board concluded that, however attractive humility is as a personal quality, it does not make sense for an institution that wants to be influential and have impact. Using data and research as a platform, we mounted a very active communications program nearly overnight. Many experienced this as an abrupt change in the Foundation's comportment. The community saw a Foundation that, for its previous 90 years, had done everything it could to shun publicity, quickly transition to a Foundation that was actively seeking attention. It was a conscious decision to do this quickly, as the behavior

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9. Jackson, Ira. Personal Interview by NL Parker. 21 March 2012.



change itself attracted attention and curiosity. One observer in the business community remarked, “For twenty years I haven’t heard a word about the Boston Foundation. Now I’m hearing about them every day.”

One of the troubling trends in America is the decline in newspapers. As yet, there is nothing in the new media that yet comes close to replacing the communal asset created by community leaders reading a good metropolitan newspaper. Boston is very fortunate: most leaders in government, in business, and in the nonprofit world still read an excellent metropolitan newspaper, *The Boston Globe*, every day. With a widely respected public radio station, WBUR, an excellent independent policy magazine, *CommonWealth*, and various other specialty publications with healthy followings, Boston does not lack for other reliable media focused on local and regional issues. The Foundation has made it our business to cultivate strong relationships with these media and to position ourselves as a knowledgeable independent source of data and insight on various public issues.

The return on this investment in relationships has been remarkable. For instance, on the day we released *School Funding Reality* at an Understanding Boston forum, a front-page article appeared in *The Boston Globe*, titled “Health Costs Sap State Aid for Schools.” The article declared,

Largely because of health care costs, school districts have been forced to make painful spending cuts, in books, teachers, and teacher training.<sup>10</sup>

The article went on to explain that the findings “dovetail with the Boston Foundation’s push to loosen union control over health care benefits.” The story was also picked up by WBUR in its radio and online media, including a statement from Education

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10. Levenson, Michael. “Health costs sap state aid for schools: Education reform law falls short, report says.” *Boston Globe* 09 Dec 2010. Print.

Secretary Paul Reville about the governor's interest in taking up the issue. "This is a top priority of his," Reville said of the governor. This kind of attention from the *Globe* matters, and it has been crucial to every success the Foundation has had.

In addition to using media outlets to advance advocacy and leadership work, the Foundation has made a concerted effort to uncover and share our history. Professor Joel Fleishman is eloquent on this issue in his book *The Foundation: A Great American Secret*. He describes

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foundations as "organizations that devote their efforts to changing society, yet rarely seek to measure, or even comprehend, the extent of the changes they actually produce."<sup>11</sup> Beyond not having a clear understanding of their own accomplishments, foundations frequently do a poor job communicating their work to the public.

When I joined the Boston Foundation, I was familiar with its grant-making, and having been involved in housing and community development, I was aware of the great accomplishments of the Foundation in that area. However, I was naturally curious about successes in other areas. In my early days as president, I went around asking staff, board, and members of the community for the "David Letterman Top Ten" list of accomplishments of the Boston Foundation. I asked, "If you had to defend our tax exemption in the next five minutes, what would you say?" It was disconcerting how few concrete examples were cited. One of the things done to combat this lack of awareness was to excavate the Foundation's hidden and disconnected track record. A consultant, Patricia Brady, an amateur historian and a great writer, went back

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11. Fleishman, Joel L. *The Foundation: A Great American Secret*. New York: PublicAffairs, 2007. xiv. Print.

to the 1950s and wrote about the Foundation's greatest accomplishments. She presented her findings at a board dinner and the board was stunned. One of our directors said:

I've been involved with TBF for twenty years and I've been on the board for ten. I thought I was paying attention. I didn't know any of this.

This is a big problem in the foundation world: not knowing and reporting your own successes but also not knowing or report-

**Knowing more about the Boston Foundation has given the community new appreciation for the Foundation's many contributions to the community over the years.**

ing your failures and being very public about them. Foundations enjoy extraordinary privileges and they have a public obligation to transmit what they think they've accomplished and

what they haven't. Knowing more about the Boston Foundation has given the community new appreciation for the Foundation's many contributions to the community over the years.

A major element of this civic leadership strategy was direct, hands-on public policy work. Many foundations keep their distance from the government to avoid what they see as the taint of politics, but public sector engagement is absolutely essential to the mission of promoting a vital and prosperous city and region. There is not a single large and important problem in society that can be solved without the involvement of the public sector. To significantly improve K-12 education outcomes for Boston's students, the time students are spending in school cannot be ignored, and public education is run by the city of Boston. Similarly, the Foundation does not have grantmaking dollars nearly large enough to counter challenges like decaying cultural facilities, high housing prices, or soaring rates of obesity and preventable diseases without attracting public dollars. Coming to the



decision to enlarge impact leaves no choice but to engage with state and local governments.

The Foundation cultivates deep relationships with elected and appointed officials at all three levels of government, but particularly at the state level. We are, of course, the *Boston* Foundation, but the policy levers that have the most impact on the population we are trying to serve are at the State House. We are helped by geography: Boston is the capital of Massachusetts. The State House is a ten-minute walk from our offices. Our situation would be fundamentally different—generating statewide impact would be more difficult—if the state capital were Springfield or some other Massachusetts city.

We quickly realized that the level of intended activity in the public policy arena would require someone at the Foundation to become a registered lobbyist. Massachusetts's laws around lobbying and political communication are some of the strictest in the nation,

and require that anyone spending more than 25 hours or earning more than \$2,500 in a six-month period for lobbying activities must register as a lobbyist. During an intensive public policy push, this threshold is easy to cross. The word “lobbyist” has acquired a vaguely unsavory connotation and having them at a foundation is

**The Foundation conducts public policy work in an above-board, rigorously nonpartisan and non-polarizing way.**

a jarring notion to some. However, implicit in the Board’s decision to get involved in public policy work and the ensuing raised profile was the expectation that we would manage public perception and abide by the laws as a matter of course. The Foundation did, however, seek Board approval for a *Statement on Public Policy Activities and Contact with Public Officials* policy, which assists staff across the Foundation with understanding and abiding by the laws in this area. 501(c)3 organizations have significant latitude to participate in the public policy process, but they had better play by the rules.

We engage public officials in our decision-making processes and offer ourselves as a source of information and a conduit to the business and nonprofit community. We have periodically done research on topics requested by public officials. Perhaps most importantly, the Foundation is willing to step out in front of a controversial issue, providing political cover and additional policy options for elected officials. The expectation is that staff members throughout the organization, particularly our program officers and senior managers, build relationships with all key officials in their sectors at the city and state levels. Our program director for education, for example, works closely with Boston’s superintendent of schools and her staff and the state’s secretary of education and his administration.

The Foundation conducts public policy work in an above-board, rigorously nonpartisan and non-polarizing way. A key component of this has been basing recommendations and

advocacy positions on data and rigorous research, which provide legitimacy for our presence in this arena and objectiveness to our stances. The other essential feature has been a focus on building coalitions of business, community, and civic leaders to join us as we advocate for major policy changes. Business and civic leaders are often not eager to participate in the public realm. In addition to being intimidated by the anticipated level of effort and time required for getting involved, many fear that, regardless of what kind of effort they put in, they will not be able to influence the system. They assume the power of lobbyists and interest groups is too strong. The Foundation plays an essential role in building coalitions large and varied enough to make a real impact, handling the details and logistics of maintaining these coalitions, and making sure that no coalition member is asked to do too much. When it is easy to get involved, it is surprising how many are willing to contribute time and influence. They just need to be asked, and organized.

Following the release of *The Greater Boston Housing Report Card 2002*, the Foundation convened our first coalition, the Commonwealth Housing Task Force, made up of business, civic, and community leaders from Greater Boston. In October of 2003, the Task Force called for the creation of new Smart Growth Housing districts to counteract the unfavorable trends identified in the *Report Card*. A *Boston Globe* editorial in November of 2003 commented,

The Commonwealth Housing Task Force has proposed the most innovative plan to increase the housing stock in Greater Boston since the run-up in prices began two decades ago. The plan is sure to encounter roadblocks, but the broad coalition assembled by the task force . . . suggests that its supporters have the staying power to change public policy.<sup>12</sup>

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12. "Planning for housing." *Boston Globe* 18 Nov 2003. Print.

## The Boston Foundation Over the Years

	1990	2000	2010
Number of Staff	19	42	62
Operating Budget	\$2.1 million	\$5.7 million	\$8.7 million
Total Assets	\$248 million	\$698 million	\$733 million
% Assets in DAFs	16.2%	33%	38%
% Assets in Discretionary Endowment	62.6%	50%	33%
Total Grants	\$15 million	\$53 million	\$82 million
Total Contributions	\$11 million	\$73 million	\$83 million
Number of Publications <i>(approximation)</i>	10	11	20
Number of Registered Lobbyists on Staff	0	0	3
Number of Forums <i>(approximation)</i>	0	0	12

The reforms were enacted by the legislature and signed by the governor in the Smart Growth Zoning and Housing Development Act of 2004. The success and experience of the Commonwealth Housing Task Force offered a case study for the Boston Foundation in coalition building and bringing together diverse interests and voices, helping to sharpen our model and informing our future work and strategies. Independent, third-party leadership is such a scarce commodity that when it appears people take notice.

Driven by successes like the passage of the Smart Growth act, the Foundation has developed the mentality that it is most effective to use “all the tools in the toolbox”—when grantmaking, organizing, research, forums, press, and public policy all work in concert. The things we are trying to do are difficult, but we have

compiled a list of substantial legislative achievements in workforce, the environment, affordable housing, arts and culture, criminal justice, home rule, education, and healthcare in just a few short years.

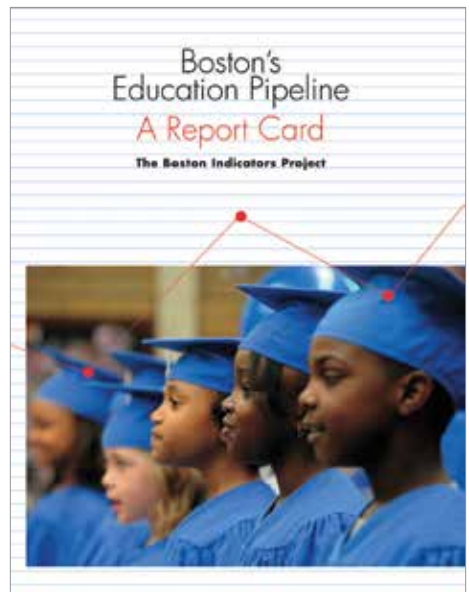
## Case Study:

### Education Reform

The Boston Foundation's work on K-12 education reform illustrates the power of the "all the tools in the toolbox" approach.

Though urban education in America is in perpetual crisis, Boston has long enjoyed a number of uniquely favorable conditions. Since 1991 the mayor has controlled the schools, eliminating the routine political interference and micromanagement that had come from the previous elected municipal school committee. The system has enjoyed great stability: the superintendent, Tom Payzant, widely regarded as one of the top public educators in the country, stayed in office for eleven years from 1995 to 2006. Further, Boston was a national champion of incremental reform, introducing changes and innovation to the schools gradually, in ways agreed upon by the administration and the teachers' union. However, despite these advantages, Boston was no exception to the national underperformance of urban education.

In line with our new civic leadership approach, the Bos-







ton Foundation began to commission reports looking at the state of education. As highlighted below, these reports painted a picture of a district that was stable but was not delivering significant academic gains for its largely low-income students. Wedded to its incremental approach, Boston appeared to be confusing stability with progress. The question became: if Boston, operating under unusually favorable conditions, cannot deliver results, then what urban school system will? Very quietly charter schools, also serving low-income youth, were operating very differently and showing great progress in Boston. The Boston Foundation decided to take a searching look at the charter phenomenon and its implications for the regular schools. Research looked at alternative structures and rules for public schools and began to make the case for charters, more flexible contracts with teachers' unions, and pilots, which are in-district schools with some charter-like autonomy.

**The Boston Foundation decided to take a searching look at the charter phenomenon and its implications for the regular schools.**

At first, in 2002, the Foundation's call for structural change caused considerable consternation on the part of the mayor and many school improvement organizations that were still wedded to the incremental approach. The mayor and other public officials, joined by the powerful public employee unions in both state and city government, were adamantly opposed to more charter schools. However, as report after report detailing the unsatisfactory state of Boston's schools came in, public officials began to acknowledge the need for fundamental change.

One particularly damning study looked at college completion rates for Boston Public School students. The city had long congratulated itself that, for an urban district, an unusually large number of its public school graduates enrolled in college. No one had ever looked at how they did once they got there. A report by the

Private Industry Council and Northeastern University, funded by the Boston Foundation, found that only 35.5% of Boston Public School students who enrolled in college completed a two- or four-year degree within seven years of their high school graduation.<sup>13</sup> This figure caused uproar when it was featured on the

**These charter schools were erasing half of the black-white achievement gap in middle school math in just one year.**

front page of *The Boston Globe*<sup>14</sup>.

The Boston Indicators Project's 2008 report *Boston's Education Pipeline: A Report Card*<sup>15</sup> combined this figure with high school dropout and enrollment data, finding that

an entering ninth grader in a Boston high school had only a 7.5% chance of graduating from college, and the Foundation was suddenly the skunk at the garden party of incrementalists.

The evidence continued to mount that not only were the Boston Public Schools not making enough progress, but that charters were succeeding with similar populations of low-income students. The January 2009 Understanding Boston report mentioned above, *Informing the Debate: Comparing Boston's Charter, Pilot and Traditional Schools*<sup>16</sup>, showed the tremendous results that charters were achieving. And the results *were* truly remarkable; our researchers, including Thomas Kane at the Harvard School of Education, ran the entire study over again because the findings were so dramatic. These charter schools were erasing half of the black-white achievement gap in middle school math in just one year. Strikingly, they were providing approxi-

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13. Sum, Andrew, Neeta Fogg, et al. Getting to the Finish Line: College Enrollment and Graduation, A Seven Year Longitudinal Study of the Boston Public Schools Class of 2000. Boston Private Industry Council, 2008. Print.

14. Vaznis, James. "Hub grads come up short in college: Most from class of 2000 have failed to earn degrees." *Boston Globe* 17 Nov 2008, A1. Print.

15. Kahn, Charlotte, Tim Davis, and Jessica Martin. *Boston's Education Pipeline: A Report Card*. The Boston Foundation, 2008. Print.

16. Abdulkadiroglu A, Angrist J, Cohodes S, Dynarski S, Fullerton J, Kane T, Pathak P. *Informing the Debate: Comparing Boston's Charter, Pilot and Traditional Schools*. Boston, MA: The Boston Foundation; 2009. Print.

mately 378 more hours of education in a 180-day school year, fitting in some 62 more traditional school days inside a one-year envelope.

The *Informing the Debate* report also provided the Boston Foundation with a very public setback. Since 2002, the Foundation had been a strong advocate for pilot schools, supporting them with dollars, advocacy, informational meetings, and our reputation. While the results in this report were strong for charter schools, the results for pilot schools were inconclusive, a blow to a key part of the Foundation's strategy in K-12 education. Though disappointed, the Foundation gained great legitimacy in the education community and with public officials through being frank about these findings and transparent about what they would mean for our strategy going forward.

With the issue firmly established in the public narrative, the Foundation turned its attention to convening, mobilization, and advocacy. At the January 2009 forum releasing *Informing the Debate*, panelist Paul Sagan, president and CEO of Akamai Technologies, a Cambridge-based technology company called for lifting the cap on charter schools in Massachusetts. In the spring of 2009, the Foundation hosted Richard Barth, President and CEO of the KIPP Foundation, at an Understanding Boston forum, where he announced that if the charter cap was lifted, the highly successful KIPP schools would come to Boston. Before the summer of 2009, both Mayor Menino and Governor Deval Patrick, previously reluctant to support charters, backed the idea of at least a partial lifting of the cap that was preventing



## The Boston Indicators Project

MEASURING WHAT WE VALUE

An Initiative of The Boston Foundation ■ A Project of Boston's Civic Community

# Race to the Top Coalition

INVESTING IN OUR STATE'S CHILDREN



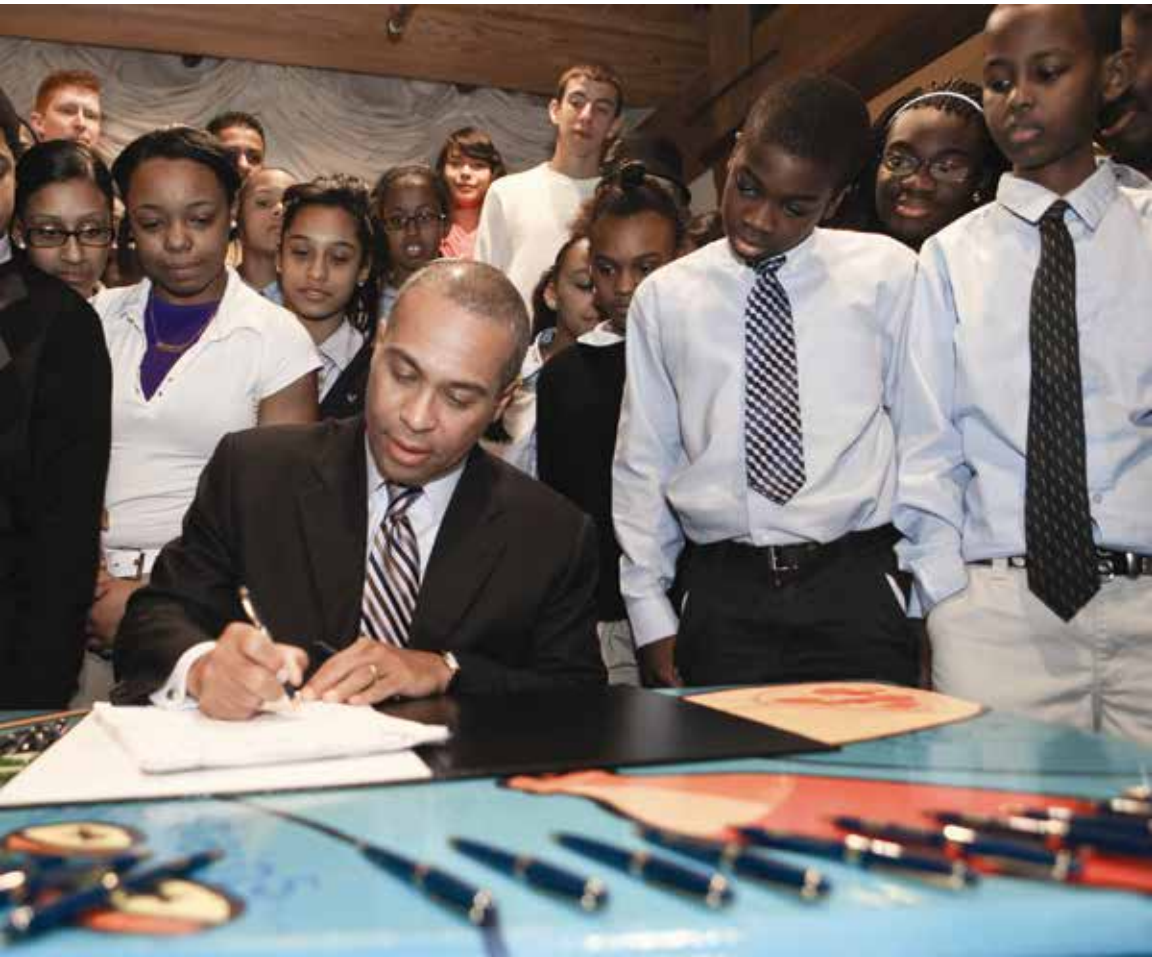
the further growth of charters in the Massachusetts cities where they were most needed.

With the time ripe for education reform, the Foundation announced the Race to the Top Coalition in October of 2009. The Coalition borrowed the moniker, “Race to the Top,” from President Obama’s education initiative, which had the further benefit of reminding everyone that there was potentially a federal windfall of education funding if the reform effort met the national standard. As a group of business, community, and civic leaders without a direct stake in education reform, the coalition attracted significant attention from public officials and the media. In one long and crowded public hearing with the Massachusetts legislature’s Joint Committee on Education, representatives of the coalition were peppered with questions for forty-five minutes: Why did they care about this issue enough to wait for hours in a crowded hearing room? What would this legislation do for them? And the answers they gave, that these reforms were vital to the economic strength of the region and vital to their business and were simply the right thing to do, held great sway with the committee because of the stature and independence of the speakers. The coalition also held high-level press conferences at the State House, met privately with legislative leaders, and worked behind the scenes to shape a compromise bill.

The new legislation, *An Act Relevant to the Achievement Gap*, was passed by the legislature and signed into law by the governor on January 14, 2010. It doubled the number of charter school seats

in the cities where underperforming schools tend to be concentrated (including Boston) and provided superintendents with new tools to turn around those schools. It also included provisions for converting many traditional schools to charter-like formats, conferring personnel, budget, and curriculum control on individual schools.

It is a testament to the power of independent advocacy and a strong, established public narrative that, in an election year, both the Massachusetts House and Senate (typically very responsive to public employee unions) voted more than two to one in favor of these sweeping reforms and innovations over the strenuous objections of organized labor. The legislation also paved the way for Massachusetts to receive \$250 million in federal Race to the



Top funding, the equivalent of well over twelve years of the Boston Foundation's entire discretionary grantmaking budget. In a letter to the Boston Foundation from Governor Deval Patrick, he wrote, "There is a broader lesson here about the good that comes when diverse leaders work together." In a handwritten postscript, he added, "This was our finest hour."

### Costs and Concerns

Of course, there are a number of concerns about community foundations playing this sort of public role. The build-out of staff was expensive, and there was no dedicated revenue for it. Some were concerned that the new and more public stance would alienate donors and hamper fundraising efforts. There were also fears of running afoul of powerful people and institutions by taking public stands. After over a decade the verdict is pretty much in, however, and these concerns have largely not materialized. In fact, the new visibility and civic leadership function has given the Foundation a much more distinct and clarified franchise and resulted in enormous new support for the Foundation.

In taking on a larger role, the Foundation did not have the necessary resources for the additional work, and the board insisted that new revenue be identified. We decided to test whether our donors and board would help us by making contributions to an annual fund, which we called our Civic Leadership Fund. This revenue supports key components of our leadership model: the Boston Indicators Project, additional research, public forums, and serial mobilizations of business and civic leaders. This was the first time that the Foundation had asked for contributions to support its own operations. But it worked. The fund has grown from \$325,000 in its initial year in Fiscal Year 2003 to over \$1.4 million in Fiscal Year 2012. It is made up of mostly modest contributions from many individuals, and therefore it is not a particular bur-

den on anyone. In 2012 there were 289 donors, of whom 235 were repeat donors to the Fund. Contributors include Donor Advised Fund holders, members of the board of directors, staff, vendors, corporations, private foundations, and civic leaders. The Fund retains nearly 80% of donors year to year, and the Foundation's board has been thoroughly supportive, which carries a lot of weight with donors and prospects. Before the Fund was launched, only a few board members made financial contributions to the Boston Foundation. It has since become a key way for board members to support the Foundation and in recent years board participation has been at 100%.

**Any institution that is deprived of honest feedback is not going to do as well as it might.**

The Civic Leadership Fund has produced several unforeseen benefits. The fund has succeeded in attracting a large number of the most prominent and respected citizens of Boston, many of whom were not previously donors to the Boston Foundation. Giving to the fund in small amounts is a soft introduction to the Foundation, signaling interest and some cases leading to increased involvement, such as opening a donor advised fund or contributing to a programmatic initiative. Additionally, the support of these distinguished donors serves as a source of validation and legitimacy, particularly as the Foundation takes on controversial issues. *The Boston Globe* contributes a full page ad every year to publish a public thank-you and list of contributors. Finally, these fundraising calls are an indispensable way for Foundation leadership to engage and get feedback. When I was appointed to the Boston Foundation, Creed Black, former head of the Knight Foundation, told me, "Watch out. When you become the head of a foundation, you have had your last bad meal and your last honest conversation." There is a profound truth here; foundations have a lot of difficulty getting good information about how they are doing, and any institution that



is deprived of honest feedback is not going to do as well as it might. The only solution is to proactively create situations to get candid feedback, and no one is as frank and outspoken as when you are asking them for money.

More broadly, it has also been clear that donors have not been alienated by the Foundation's civic leadership activities and con-

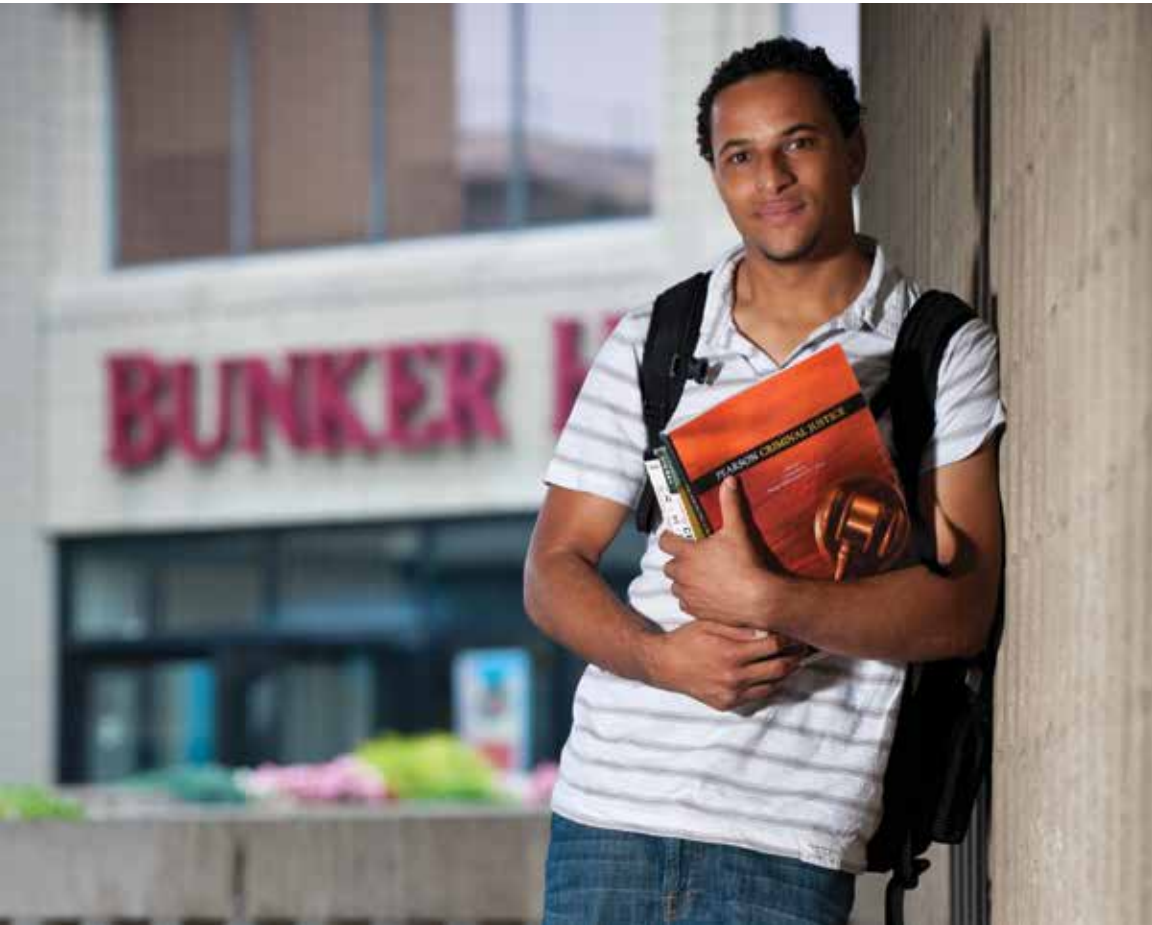
**When trying to change the status quo, you will always be challenged by the interests that benefit from the current reality.**

troversial stances. Since beginning this work, fundraising has grown from \$30 or \$40 million per year in new gifts to \$80 million or more. Many new donor advised fund holders cite the new role and

increased visibility as the reason they work with the Foundation, as opposed to the many other options available in Boston. There has also been considerable success engaging these philanthropists in the Civic Leadership Fund, raising over a third of our annual drive from donor advised fund holders.

However, there is no question that this kind of visible, vigorous role can cause the institution to run afoul of powerful interests. If a foundation increases in influence, naturally not everyone is going to be happy about it. Frankly, if you're doing it right, you're going to make some people angry. Trustees can have a low tolerance for conflict, particularly as serving on the board of a community foundation is a way to do good for the community. But nothing important in society changes for the better without conflict; as legendary Boston Mayor Kevin White said, "If no one is angry at you, you are not doing anything very important." When trying to change the status quo, you will always be challenged by the interests that benefit from the current reality. The idea that one can be on good terms with everybody, never rock the boat, never challenge established practice or entrenched systems, and yet drastically change the world for the better is unfortunately a fantasy.

With a different role comes a different level of risk management for a community foundation. If you are frequently in the press for positive reasons, if something goes wrong, it could well be in the papers as well. Some people will be unhappy. For instance, the Boston Foundation has had an up-and-down-relationship with Boston's very powerful and long-serving mayor, Thomas Menino. There were times when he found some reports or forums to be insufficiently upbeat, or when there were fundamental disagreements about a public policy change or program. However, the Foundation has also worked with Mayor Menino to produce some remarkable accomplishments, such as the education reform legislation and a very effective public-private partnership, the Boston Opportunity Agenda, which seeks to strengthen the



education-to-career pipeline for all Boston residents. Additionally, the Foundation has had recurring conflicts with public employee unions, particularly the Boston Teachers Union, historically a powerful force in Boston. More recently, we have drawn significant fire from community college presidents and their supporters for a report on the state's community colleges and advocacy for legislation to restructure the system. When we face these conflicts, we do so with robust coalitions of business and civic leaders helping us to shape the agenda and with the legitimizing force of data to back up our claims.

## Conclusion

As a field the nonprofit sector has not done a good job explaining the things it can do that the business and government sectors can't or won't. Are nonprofits necessary to solving today's challenges? Our country is facing many: rising inequality and poverty, subpar urban public education, soaring health care costs that are crowding out key investments in the future. In other eras Americans created innovations such as land grant colleges, the New Deal, and the G.I. Bill and committed themselves to popular causes such as the civil rights and women's rights movements. Community foundations, as trusted, nonpartisan institutions committed to the social good, with access to resources and deep ties to their locales, are uniquely positioned to help find solutions to today's challenges. The thought that governments and business can solve these challenges without independent civic leadership is simply incorrect.

The Boston Foundation has piloted a new community foundation model, one that joins a think tank and a significant capacity for civic leadership to the traditional foundation grant-making structure. We make a self-conscious effort to marshal influence to attack some of the biggest challenges facing the community,

## How Civic Leadership Has Changed Our Thinking

	Old Way	New Way
<b>Approach to Community Change</b>	Focus on good grants and quietly supporting community change-makers. Passive, behind-the-scenes grantmaker.	Mobilize business and community leaders to action on key city issues. Activist, vocal grantmaker and civic leader.
<b>Data and Research</b>	Occasional use of data or research on a specific topic.	Rely on data and commissioned research to reveal or highlight key challenges. Distribute findings and recommendations widely.
<b>Media</b>	Avoid media attention. Strategically fund community leaders who drive the regional conversation.	Court media attention. Shape the regional conversation about key issues, with TBF and data at the center.
<b>Public Sector Engagement</b>	No lobbyists on staff. Episodic engagements with the public sector on specific issues.	Four lobbyists on staff. Consistent, organization-wide engagement with the public sector on all aspects of foundation strategy.
<b>Storytelling</b>	Little attention to tracking and publicizing TBF's stories and achievements.	Elevation of stories for community and media attention. Excavation of historical achievements.
<b>Fundraising</b>	Fundraising focused on endowment growth: donor advised, discretionary, and dedicated funds.	Fundraising focus expanded to include operations support for leadership activities. De-emphasized dedicated funds.
<b>Staff Capacity</b>	Small foundation staff, focused on grantmaking, administration, development and donor services, and finance.	Large, expanding staff, including robust communications, community relations, and public affairs capacity.
<b>Controversy</b>	Avoid controversy and public disagreements.	Selectively engage with controversial issues. Public disagreements viewed as occasionally necessary for real change.

and we have found that, under the right circumstances, we can be extremely effective. In pursuing this model, the Boston Foundation is positioned to make a positive impact regardless of the challenges that come before us.

To undergo a transition like the Boston Foundation's was unquestionably a challenge, despite our significant advantages: our wealth of universities, location in a state capital, strong sup-

port from the board, and unrestricted grant funds. We are part of a major movement in the community foundation field. When I first joined the Boston Foundation, I began to attend the annual retreat of leaders of large community foundations. I was appalled by the narrowness and timidity of the agenda at the first few meetings I attended. Discussion was entirely focused on donor advised funds, technology, and how to compete with major financial institutions for new accounts; there was little discussion of issues in the community. Now these meetings are completely different. Clearly the field is looking carefully at leadership and change. Those who still hold a narrow view of community foundations must adapt.

The days of quiet philanthropy are behind us. As a field, we will need to get over our fear of conflict and embrace healthy disagreement. We will need to put our grantmaking dollars to work in supplying our community with relevant, accurate, and timely information to help our communities make informed decisions. We will need to build a new network of independent leaders for every city and region. We will need to excite a new, vocal generation about philanthropy.

Institutions should always seek to maximize their value propositions. The civic leadership model can do just that for community foundations.

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**PAUL S. GROGAN** has served as President and CEO of the Boston Foundation since 2001. With assets of more than \$800 million, the Foundation distributed grants of more than \$88 million to nonprofit organizations throughout the Greater Boston community in 2012. He joined the Foundation from Harvard University, where he was Vice President for Government, Community and Public Affairs. Prior to 1998, he was President and CEO of the Local Initiatives Support Corporation (LISC), where he raised and invested over \$3 billion in inner cities across America. His passion for cities began in Boston working in the administrations of mayors Kevin White and Raymond Flynn. Mr. Grogan graduated with honors from Williams College, earned a master's degree from the Harvard Graduate School of Education, and was awarded a Bicentennial Medal in 1997 from Williams College. He holds honorary degrees from The Boston Architectural College and The Benjamin Franklin Institute of Technology. He is a founder and director of The Community Development Trust, a director of New Profit Inc., and a trustee of Brandeis University. He is coauthor with Tony Proscio of the book *Comeback Cities*.

**Edward Skloot** is Director of the Center for Strategic Philanthropy and Civil Society and Professor of the Practice of Public Policy at the Sanford School of Public Policy, Duke University. For eighteen years, until 2007, he was President of the Surdna Foundation, a family foundation headquartered in New York City. He has written and spoken widely on the subjects of nonprofit management, social venturing, and sectoral leadership. A compilation of his speeches, *Beyond the Money*, was published by the Surdna Foundation. Skloot also was the principal writer and editor of *The Nonprofit Entrepreneur*, published by the Foundation Center, and the coeditor, with Paul Bloom of Duke's Fuqua School of Business, of *Scaling Social Impact: New Thinking* (Palgrave MacMillan, 2010).

**The Center for Strategic Philanthropy and Civil Society**, a unit of Duke University's Sanford School of Public Policy, researches, analyzes, and promotes philanthropy that consistently produces high impact. The mission of the Center is to help philanthropy achieve broader and deeper impact in solving problems facing the social sector and the wider civic community. The Center's core approach is to engage with philanthropic foundations, providers of service, high-net-worth individuals, corporations, and public policy practitioners to advance and improve philanthropy. CSPCS works collaboratively with individuals and organizations within Duke and elsewhere to maximize impact. For more information, visit <http://cspcs.sanford.duke.edu/>.

**The Boston Foundation**, Greater Boston's community foundation, is one of the oldest and largest community foundations in the nation. It serves as a partner in philanthropy through some 900 separate charitable funds established by donors either for the general benefit of the community or for special purposes. In addition to being the largest grantmaker in New England, the Foundation is a civic leader and a sponsor of special initiatives that address the region's most pressing challenges. The Philanthropic Initiative (TPI), an operating unit of the Foundation, designs and implements custom philanthropic strategies for families, foundations, and corporations around the globe. For more information, visit <http://www.tbf.org>.

