

1-1-2011

## Executive Summaries

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### Recommended Citation

(2011) "Executive Summaries," *The Foundation Review*: Vol. 3: Iss. 4, Article 2.

Available at: <http://scholarworks.gvsu.edu/tfr/vol3/iss4/2>

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VOL. 3 ISSUE 4 *Family Foundations and Philanthropy*

## TOOLS

### 14 Developing a Master Data Sharing Agreement: Seeking Student-Level Evidence to Support a Collaborative Community Effort in Education

*Neil E. Carlson, Ph.D., Calvin College; Edwin Hernández, Ph.D., and Chaná Edmond-Verley, M.S., DeVos Family Foundations; Gustavo Rotondaro, M.U.P.D.D., and Eleibny Feliz-Santana, M.S., Grand Valley State University; and Susan Heynig, B.A., Grand Rapids Public Schools*

The authors, who represent a family foundation, a college, a university, and a public school system, describe the process of developing an agreement that allows student-level data to be shared for research and evaluation purposes. Keys to reaching the agreement included clear distinctions among roles and access to data, strict adherence to consent and confidentiality agreements, and a shared commitment to using data to improve student outcomes.

doi: 10.4087/FOUNDATIONREVIEW-D-11-00024

### 34 The Education Collaboration Fund: Possibilities and Limitations of Pooled Funds

*Lisa Philp, M.B.A., Foundation Center*

A pooled fund provided matching funds for the U.S. Department of Education's Investing in Innovation program. Shared interest around a topic or community is a necessary but insufficient reason for participating in a pooled fund. A pooled fund provides an opportunity for individuals and family foundations to learn and grow as donors. Vehicle choice is straightforward: The underlying public charity and administrative processing can be handled by a donor-advised fund at a community foundation or federation, financial services firm, or intermediary.

doi: 10.4087/FOUNDATIONREVIEW-D-11-00018

**47** What Is a Family Foundation?

*Michael Moody, Ph.D., Allison Lugo Knapp, M.P.A., and Marlene Corrado, M.P.A., Johnson Center for Philanthropy, Grand Valley State University*

Although family foundations are important institutions, there is no shared definition of this diverse and evolving category. This article surveys the different definitions of family foundation used by key organizations in the field and by researchers. The authors conclude that a single definition of “family foundation” is infeasible and largely unhelpful; they offer instead, a definitional framework using a list of “possible family dimensions of a foundation.” The list includes dimensions related to self-identification, the family’s influence and involvement, donor intent and legacy, and assets.

doi: [10.4087/FOUNDATIONREVIEW-D-11-00019](https://doi.org/10.4087/FOUNDATIONREVIEW-D-11-00019)

**62** Challenges and Strategies for Family Foundations With Geographically Dispersed Board Members

*Melanie A. McKittrick, M.A., M.P.A., Indiana University, and Deborah Hirt, M.P.I.A., The Mind Trust*

Based on interviews with leaders of 10 family foundations, the authors investigate the impact of geographic dispersion on governance, administration, decision making, and grantmaking activities. The greatest challenges for family foundations with dispersed boards involve assembling an appropriate staff, ensuring strong communication between staff and board members, and focusing the organization’s mission. Common strategies for keeping board members involved include providing flexible but clear direction to nonfamily staff, developing steppingstone board positions for successive generations, and balancing the mission with the desire to build family ties.

doi: [10.4087/FOUNDATIONREVIEW-D-11-00016](https://doi.org/10.4087/FOUNDATIONREVIEW-D-11-00016)

**74** The Family Difference? Exploring the Congruence in Grant Distribution Patterns Between Family and Independent Foundations

*Jasmine McGinnis, Ph.D. Candidate, Georgia State University, and Shena Ashley, Ph.D., Syracuse University*

Using a broad group of family and independent foundations from a representative sample of Georgia foundations, the authors examined differences in giving patterns between family and independent foundations. Confirming a previous study of large foundations, they found no substantial differences between family and independent foundations’ preferences. The authors conclude that their findings suggest that family foundation boards do not require special regulation.

doi: [10.4087/FOUNDATIONREVIEW-D-11-00015](https://doi.org/10.4087/FOUNDATIONREVIEW-D-11-00015)

**82** Next-Generation Philanthropy: Examining a Next-Generation Jewish Philanthropic Network

*Stephanie Lerner, B.A., Teach for America Corps, Atlanta*

As a result of mobility, philanthropy among a Millennial group of Jewish donors is becoming divorced from the communities in which their parents live. This group’s members generally perceive themselves as thinking and acting more strategically than past generations. They expect philanthropic organizations to operate with increased transparency. Despite these changes in expectations and the increased use of technology, the values and priorities transcend generations.

doi: [10.4087/FOUNDATIONREVIEW-D-11-00014](https://doi.org/10.4087/FOUNDATIONREVIEW-D-11-00014)

96 I'm Not Rockefeller: Implications for Major Foundations Seeking to Engage Ultra-High-Net-Worth Donors

*Katherina M. Rosqueta, M.B.A., Center for High Impact Philanthropy; Kathleen Noonan, J.D., University of Wisconsin; Miriam Shark, Ph.D., Annie E. Casey Foundation*

This article describes how a group of 33 ultra-high-net-worth philanthropists (UHNWPs) approach their giving. Education, health, poverty and social welfare, and children/youth initiatives were priorities for this group. UHNWPs view their peers as their most trusted information resource. After peers, the most commonly cited source of information was the popular press. UHNWPs typically are ambivalent or uncertain about the value of evaluation. Partnerships between organized philanthropy and UHNWPs have potential benefits for both, if barriers of job responsibilities, training, communications styles and vocabulary can be overcome.

doi: [10.4087/FOUNDATIONREVIEW-D-10-00020](https://doi.org/10.4087/FOUNDATIONREVIEW-D-10-00020)

**BOOK REVIEW**

110 A Hedgehog Moment: The Roles and Pitfalls of Strategic Philanthropy for Family Foundations and Donors

*Book Review by Charles H. Hamilton, M.B.A., Bessemer Trust*



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Printed in USA



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