Unplanned Donor Legacies:
How to Avoid Them, and How One Family Foundation Corrected Course with an Evaluation

Introduction

When foundations consider the social impact of their key investments or initiatives, it is typical to look outward—to the quality of their grantees, the reach of a collaborative network, or the changes in a neighborhood they intend to influence. Yet, the legacy of a Foundation's investment is also reflected in its relationships with grantee partners, connection to the community it seeks to serve, and its definition of long-term success. Thus, philanthropic expectations and relationships can both *shape* and *reflect* the project's impact and are as important as the quality of the programs themselves. How these relationships and expectations are initiated, structured, and operationalized influences the trajectory of a project and the legacy a foundation leaves behind.

Based on our recent work together on evaluation of a place-based initiative in Richmond, Virginia, we delineate the ways in which a foundation's relationship, influence, and expectations around a collaborative community-based partnership shaped its legacy. In this particular case, The foundation's intent was three-fold: (1) to pilot a more efficient and unique form of comprehensive collaboration for serving young children; (2) to share the knowledge of the pilot more broadly with the philanthropic field and its home community; and (3) to demonstrate to the neighborhood their long-term commitment to serving vulnerable children through a major investment, ultimately with a brand new building. Yet the way that the primary partnership and additional collaborations were structured had an unexpected impact on their intent.

We show how the experience of developing and completing a comprehensive evaluation—which involved a look *outward* at impact and a look *inside* the relationship network of the partnership—ended with a family foundation reflecting on its work and modifying its approach to grantmaking and community partnerships.

> Key Points:
> - As funders turn to community change, **intentionally addressing the unique power differential** between funder and grantee partners and structuring ways to mitigate this imbalance is essential to honest communication.
> - Funder **relationships with their grantees** impact the legacy of major community initiatives. This article explores the relationship and effects through the lens of one foundation's recent evaluation—the Robins Foundation in Richmond, Virginia—and its follow-up actions.
> - Through a participatory evaluation process, we derive **three principles** for funders: **build equitable partnerships, set up structures for mutual learning, and evaluate with intent**.
> - As a foundation committed to continuous learning, we will show how the Robins Foundation, it grantee partner, and the evaluators modeled these approaches in the assessment process and how the Robins Foundation is recalibrating its approach to grantee partnerships and integrating the three principles into all of its work.

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We provide three principles for donors to consider in their own reflections of their funder-grantee partnerships and the way these may be influencing the impact of the work and the likelihood of a positive legacy: (1) create an equitable working partnership, (2) engage in continuous mutual learning, and (3) evaluate to match implementation with intent.

Although we were familiar with these ideas, we learned that knowledge was not enough; donors will be more successful if they intentionally address these principles as core elements of program design and implementation. These principles, together with guidance on implementation, will help small and mid-size philanthropies investing in large-scale community partnerships protect against undue influence, plan realistically for donor legacy, and develop an honest and trusting funder-grantee relationship.

The Partnership for Families

Investment in the Partnership for Families was a philanthropic "big bet" for the Robins Foundation in Richmond, Virginia—an eight-figure gift intended to facilitate transformative change and be a model for other neighborhoods. The Partnership for Families was established in 2003 to actualize the Robins Foundation's commitment to early childhood development and coordinate a neighborhood-wide initiative to prepare young children in a low-resourced neighborhood for kindergarten. The foundation sought to deploy resources in an innovative way that would accelerate improvements for children and families. They piloted a coordinated approach that they believed would be more effective than providing individual grants to nonprofit agencies and would change the educational indicators for all young children in the neighborhood over time. By 2016, the foundation had invested over $20 million—more than it had in any other project to date.

As a symbol of its commitment to this signature initiative, the Robins Foundation constructed a LEED gold-certified center of Partnership operations in the heart of the Northside neighborhood and invited a nationally certified early childhood education center to become its anchor tenant.
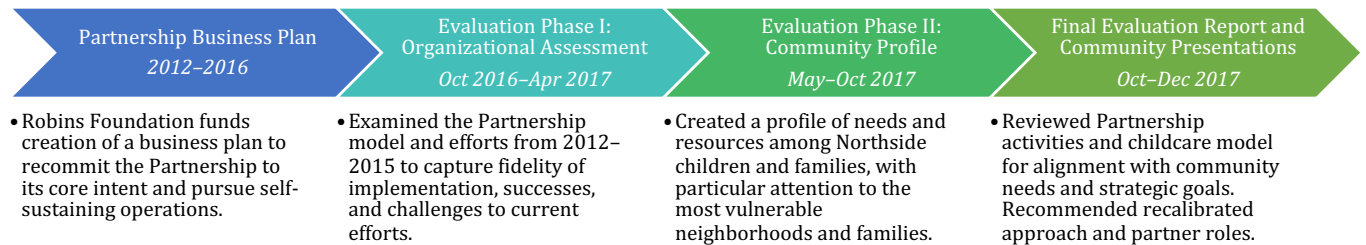
As part of their early efforts to design the initiative, Robins staff and board members sought to engage the community by speaking with parents, service providers, and local leaders. They worked to ground the work in evidence and best practices by speaking with other funders, studying census data, and consulting leading researchers in early childhood development. For its time, the Partnership model drew from best practices in both the early childhood field and philanthropy (Heckman, 2006, Karoly et al., 2005). National funders were reflecting on their roles in "field building" and investing in promising and risky ideas where they believed there was potential to bring about significant cultural and environmental change.

This field-building literature was geared toward large national foundations, yet the leadership of local foundations like Robins saw potential to change the local landscape and disrupt conventional service delivery models. The Robins Foundation board and executive director took the moral leadership of the field seriously and felt an obligation to share their

knowledge and support their hometown community. For the Robins Foundation, making such a large investment in the Partnership for Families model meant having a reputational, moral, and financial stake in the Partnership's success.

The Assessment – Timeline and Approach

Partnership Business Plan *2012–2016*	Evaluation Phase I: Organizational Assessment *Oct 2016–Apr 2017*	Evaluation Phase II: Community Profile *May–Oct 2017*	Final Evaluation Report and Community Presentations *Oct–Dec 2017*
• Robins Foundation funds creation of a business plan to recommit the Partnership to its core intent and pursue self-sustaining operations.	• Examined the Partnership model and efforts from 2012–2015 to capture fidelity of implementation, successes, and challenges to current efforts.	• Created a profile of needs and resources among Northside children and families, with particular attention to the most vulnerable neighborhoods and families.	• Reviewed Partnership activities and childcare model for alignment with community needs and strategic goals. Recommended recalibrated approach and partner roles.

In the fall of 2016, Robins engaged Communitas Consulting to conduct an evaluation to answer the question: What impact has the Partnership for Families had over time? Robins and the Partnership had a lot at stake—donor legacy and use of funds for the foundation, and future survival for the Partnership for Families, which relied on the Robins Foundation for 82 percent of its funding in 2015.

Each party also recognized that the other was essential to their success. The Partnership needed to maintain the support of its major funder, and the Robins Foundation wanted its high-profile investment to be genuinely effective, achieving its intended legacy of neighborhood transformation. Both institutions were committed to improving the Northside community. This honest examination was possible due to shifts in leadership at both organizations: neither the foundation nor the Partnership executive had been deeply involved in the creation or execution of the Partnership; thus, their collaboration allowed for fresh eyes on the past. We selected the 2012–2015 period, as it corresponded to the period in which a new business plan was created and implemented for the organization.

The Communitas evaluation team did not begin the evaluation thinking it would emphasize the Foundation's role as well as the grantees' in shaping the project's outcomes and community legacy. But early on, it became clear that the Partnership for Families' performance was one part of the story, and how the initiative had evolved was another. We—funder and evaluation team—felt it was equally important to review the Foundation's role in the project's formation as we began to understand the power and impact of the mutual relationships. This was particularly important as one of the principal goals of the study would be to recommend a way forward for both.

As we began the assessment, the evaluation team realized that it would be easy to continue with an imbalance of power and create a research scenario where the foundation held the cards and the Partnership was reluctant to share data that left its team and organization vulnerable to critique. Such an approach had potential to bias or limit the evaluation. However, all of us—funder, evaluators, and grantee partner—wanted to assess the real results without fear. We subsequently committed to designing an approach that would

allow both parties to improve, refine, or discontinue the model. We wanted to create a space where the odds of obtaining honest and real information about program progress were high, where disruptive thinking was encouraged, and where it was reasonable to ask difficult questions. We wanted to be able to keep the option on the table of re-booting or discontinuing the whole enterprise if the results merited the change. We wanted to make it more likely that the outcomes mattered to the Northside neighborhood.

To move forward, we challenged the previous governance and communication relationships and formed a small evaluation planning team—with members from both the foundation and the Partnership—to guide the research and organizational assessment work. The evaluation "client" then became both the foundation and the executive of the program being evaluated. We established a productive space for reflection and troubleshooting among all parties, facilitating the sharing of informal and critical information throughout the assessment process.

Findings & Principles

Principle #1: Create an Equitable Working Partnership
Guidance on Developing Equitable Partner Relationships

A complex community change initiative—particularly when the balance of power favors one party—requires careful cultivation of trust; safe, well-used avenues to share news of real progress and setbacks; and routine calibration of the work (Wei-Skillern et al., 2015). On the part of funders, building trust includes relinquishing the expectation of control. Recent research in effective practices in philanthropy confirms the importance of honest communication and having a peer relationship with grantees to accomplish ambitious community transformation (Nonprofit Advisory Council, 2017, Huang and Seldon, 2014).

Foundations recognize an inherent power imbalance in relationships with grantees. Our experience underscores that recognition is not enough—action to name each party's role early in developing governance structures, adopt communication channels, and formalize decision making relationships is essential. Putting structure in place preserves the original donor intent and gives grantees the freedom to adapt as needed while staying focused on the shared goal of deep impact. Clarity and agreement across partners from the outset of the work are helpful on two levels—confirmation of the initiative's purpose, scope, and approach, and setting parameters around decision-making, governance, and management.

In successful large-scale community change, relying on initial agreements to preserve donor intent is precarious. That vision must be maintained over time through ongoing alignment and calibration (Trent and Chavis, 2009, Brown and Fiester, 2007). Alignment on community change efforts "does not automatically result from a one-time community planning process or from a foundation-sponsored initiative. The alignment that is needed is about fundamental ways of working and addressing goals, activities, capacities, relationships, and learning priorities. It also needs regular recalibration as the work proceeds" (Kubisch, 2010). Brown and Fiester confirm that from another foundation's

experience, "Lead[ing] with relationships, not money" is essential to a funder's successful legacy.

Evaluation Learnings

It may be counterintuitive to think that the intent of a large philanthropic investment could be hampered by a steadfast commitment on both the part of the funder and the grantee to make it succeed. But, in this case, funder involvement had unexpected and lasting results on the culture and incentive structure of the funder-grantee partnership. In particular, the high-stakes relationship between the Robins Foundation and the Partnership for Families appeared to inhibit transparency and rigor in problem-solving.

In unpacking the Partnership's formal and informal governance and decision-making structures, the evaluation showed that the Robins Foundation influenced the shape and scope of the Partnership in three ways: (1) as primary funder with a clear vision of success, (2) as part of its governing board of directors (through 2016) and investor council with regular oversight of operations, and (3) as a presence in day-to-day operations and decision-making and as the supervisor of the original executive directors. The first two Partnership directors reported to the foundation's executive, having a voice in the work's design and operations but without perceived final authority or autonomy. The quasi-supervisory relationship inhibited honest communication, another important ingredient in building a large-scale, innovative and risky model together. The result of this triple influence was that the Foundation inadvertently developed a relationship with the Partnership that resulted in its receiving incomplete and biased information sharing.

The unbalanced relationship carried over into the Robins Foundation's interactions with the six partner agencies who were part of the Partnership collaborative. A top-down operation arose, where these grantees deferred to the Robins Foundation, in spite of the stated desire on the part of the foundation for an active, bottom-up partnership with continuous learning and information sharing. Ultimately, structure trumped intent. As one person stated, "no one in the room misunderstood where the decisions were made," and partners and non-profit executives did not want to be seen as anything less than fully cooperating in the Robins Foundation's vision.

This situation might also have been mitigated by effective nonprofit management practices that prioritized open and consistent communication and mutual respect, identified as essential for strong funder-nonprofit relationships (Chandler, 2018, Exponent Philanthropy, 2018). However, this article focuses on the philanthropic perspective and scope of influence. Funders can take the lead in operationalizing and structuring equitable, open, and accountable partnerships regardless of the preparedness of their nonprofit partners.

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Putting Principle 1 to Work
The Assessment

This time around, the Robins Foundation adopted a much more participatory and egalitarian structure in how we collectively managed the evaluation. We modeled an explicit change in the partnership structure through our design. Situating both parties as partners in the assessment with shared responsibility for its success or failure opened up communication and creativity and reversed old funder-grantee assumptions and patterns. The shift has continued to inform the way the Robins Foundation engages with all of its grantees and how the Robins team is facilitating the next phase of its work with the Partnership for Families.

Through this process, we confirmed how achieving a positive donor legacy requires sharing control and having regular opportunities to talk candidly about power and governing relationships. As the new leaders of the Partnership and the Robins Foundation prepared to review the evaluation results with their respective boards of directors during the course of the evaluation, both acknowledged that going forward, the Partnership would design its own destiny and the Robins Foundation would assess any proposed recalibration of the model on its merits.

The Practice Change

For the Robins Foundation, the process of the evaluation affirmed the benefits of having intentional and regular communication with grantees as peers. In the particular case of the Partnership for Families, the current Robins and Partnership executives have operated as co-equals in planning for the next phase. They invited others into the conversation to build upon assessment findings. They are now working in tandem to share the results of the study—which provided two recommended options for strengthening the existing model, and a profile of families with young children in the Northside. The Foundation is stepping back as the Partnership leadership and team re-imagine and re-structure their approach. Both executives are communicating jointly to community stakeholders. The Robins Foundation's board is assessing the emerging model on its merits and asking for the kind of detail it would ask from all its grantee partners prior to making a future investment.

Guiding Questions to Develop an Equitable Partner Relationship
Through our experience as participants in this process, we recommend donors consider these questions when partnering with a nonprofit for a large-scale signature investment.
(1) Are authentic channels for honest exchange between the donor and recipient organization(s) built into the design?
(2) Can the nonprofit share negative results without risk?

(3) Are roles and expectations between the donor and the recipient organization(s) defined, with a division of responsibilities that is clear and adhered to?

Even when a philanthropy can answer affirmatively to these questions, Robins' experience suggests that the whole concept of foundations "initiating change" is often the wrong way to go in seeding local transformational investments. Philanthropic leaders may assume they have a more global perspective than those agencies in their communities, who may see only part of the story. Yet, when it comes to program creation and design, this may not be the case.

In retrospect, the Robins leadership would **advise a "bottom-up" approach**, where ideas are generated by those in the community closest to the needs, and the foundation assesses where and how it might have a partnership role. They would suggest **avoiding the lead donor role for greater sustainability** and **relinquishing control over a vision of the intended impact or reputation**. Finally, when entering into agreements, funders and grantees can **co-create communication and decision making agreements** that anticipate power dynamics and spell out protocols for responsibility and action.

Principle #2: Engage in Continuous Mutual Learning
Guidance on Continuous Mutual Learning

Effective learning is key to informing program design and delivery. At times, critical sources of information are overlooked or are not updated. For example, professional and academic experts helped the Partnership design an effective program in the early years, yet this source of expertise was not consistently balanced against other more informal forms of information. Over-reliance on those with formal expertise, with limited integration of community voices in an ongoing way, can be a pitfall (Celep et al., 2016). This is particularly true for philanthropies, which sometimes neglect to consult their intended beneficiaries (or to ask their grantees to do so), even though the beneficiaries know what they need and how they will utilize services better than external authorities. Beneficiaries' involvement in program design—both scope and delivery—is particularly important when initiatives seek to change family behavior or community culture. As a set of foundation leaders and advisers expressed it, "In bypassing the beneficiary as a source of information and experience, we deprive ourselves of insights into how we might do better—insights that are uniquely grounded in the day-to-day experiences of the very people the programs are created for" (Twersky et al., 2013).

Evaluation Learning

During our evaluation, we found that the assumptions and expertise informing the Partnership's early years—regarding community needs and early childhood best practices—had not changed much since the project's launch. Professional and academic experts helped the Partnership design an effective program in the early years, but this source of expertise was not consistently balanced with on-the-ground experience. And while the Partnership staff was actively reaching out to families as clients, their

engagement did not extend to inviting families to provide guidance into services needed, shape the program, or inform the selection and delivery of services. We found no record of another phase of deep engagement with the families identified as the market for the Partnership some ten years later, or a recalibration of the approach based on changing needs and perspectives.

Without firm grounding in real-time community context and intended impact, the Partnership model grew in an ad hoc way, responding to the diverse needs of families and the service providers seeking to reach them while nominally adhering to the Partnership's original goals. The building itself, anticipated as a resolution to many of the needs in the community, was not consistently used for the original purpose of a comprehensive and coordinated place-based intervention. Over time, the model became less singularly targeted toward school-readiness of children ages 0–5, and the Partnership used its resources to meet the needs of Northside families more broadly, not all of whom had young children. Not surprisingly, when the target population broadened, it became harder to define the Partnership's intent and capture the impact of the collaborative intervention. It also became less clear what the Partnership and its building stood for.

Putting Principle 2 to Work
The Assessment

The evaluation team knew two things in thinking about how to advise both the Partnership and the Robins Foundation in moving forward: (1) the Northside of Richmond was different today from the neighborhood the Robins Foundation studied and identified as its pilot location fifteen years ago, and (2) the true beneficiaries of the model had not been consulted in a meaningful way initially or over the period evaluated. These pieces of missing information seemed to our committee to put the intended legacy of the project , as currently structured, at risk.

We decided to revisit the current-time needs of the community the Partnership serves during the evaluation process to inform the forthcoming recommendations. We collectively agreed to ground the future recommendations in families' needs and assets. To facilitate this, the Robins Foundation supported the creation of a study and the publication of a profile of vulnerable families in Northside Richmond (Cox et al., 2017). We wanted the post-evaluation Partnership model to be grounded in the needs and perceptions of its neighborhood.

Our findings raised questions about the current model, as we learned that families were socially isolated and overwhelmed with basic needs, and—because of safety concerns—unlikely to connect with area human services. Families affirmed the value of supporting their young children's healthy development and growth and wanted to do more for their children. At the same time, historic distrust of institutions and a belief that there was little they could do to influence community conditions meant that how the program was delivered was at least as important as what it offered to the neighborhood families.

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We worked with trusted neighborhood organizations and individuals to gather information and facilitate conversations on family life, and uncovered interest in safe places for children of all ages as families' foremost desire for their children—something that had not been part of the original model. Our outreach to families also uncovered residents' heightened sense of isolation within the community—a significant factor to consider when formulating a program and philanthropic investment.

The assessment confirmed that consistent two-way communication between the donor and grantee partner, mutual learning, and research are important throughout the life of a partnership. A trusting relationship informed by data helps a donor to retrospectively check the impact of an investment, better understand the community context in which a social change investment is being made, and revisit assumptions regularly as circumstances change.

The Practice Change

Putting the family voice first seems obvious. Prioritizing residents' voices allowed the Robins Foundation the flexibility to address the other key findings and lessons from evaluation of the donor's flagship investment. Family voices now seemed foundational in setting up the study, moving forward, and bringing about real improvements in children's readiness for school. The Robins Foundation addressed its commitment to the neighborhood and staff capacity for deep oversight, evaluation, and engagement.

With the board's guidance, Foundation staff have outlined a strategy to move forward serving families. The results of this shift include repurposing square footage in the building to house like-minded community partners who serve children and families as well as updating the agreements with those in the building to ensure more vulnerable children and families from the neighborhood are engaged. The Robins Foundation also assigned its top executives specific roles in nurturing the Foundation's relationships with the Partnership and other organizations in the neighborhood.

Next, the Robins Foundation used the data from the *Portrait of Vulnerable Families* to reinsert the family voice as its "north star" to amplify what families said they needed and wanted in their community. This re-centering will increase the impact of both the Partnership and the Robins Foundation by providing parameters for services and funding. The Robins Foundation's accountability to the Partnership and other partners, the community, and to families with young children is now more clear and transparent.

Questions to Consider for Mutual Learning
Through our experience as participants in this process, we recommend donors consider these questions when initiating a large-scale participatory investment.
(1) Is the idea for the investment reflective of community needs and priorities, or the principles, theories, or values of the donor?

> (2) Does the nonprofit recipient have a built-in capacity to regularly engage those it serves in decision making, planning, and assessment?
>
> In retrospect, inasmuch as a philanthropy wants to be a co-equal and trust its nonprofit partner to read the needs and assets of the community, without **structures that invite community members to lead and design,** the nonprofit—as well as the Foundation—may only receive part of the story. The Robins Foundation received diluted and secondary information from its nonprofit partner. Had the foundation set a priority on **listening to community needs itself regularly** or requesting that its nonprofit partner include families in the design and implementation of the model, the philanthropic legacy would likely not have been the building they ultimately created for vulnerable families but something **more directly responsive to families'** concern about isolation, their children's readiness for school, and their own desire for security and economic resources to support their children**.**
>
> Philanthropies can encourage their grantees to **engage their constituencies as leaders** and participants in program design and implementation, support **more frequent market studies or profiles** of changing neighborhoods, and get out of the office to **visit, learn, and engage** with hometown communities.

Principle #3: Evaluate to Match Intent
Guidance on Evaluation

Small and mid-size local foundations often collect data from grantees without sufficient time or capacity to interpret its meaning, missing the opportunity to celebrate wins or identify need for recalibration. The Center for Effective Philanthropy notes that less than 25% of foundations regularly evaluate their own initiatives and even fewer evaluate their grantees' work (Buteau and Coffman, 2016).

Evaluation is most effective as an early and ongoing element of a program's design. Incorporating an evaluation framework allows for early opportunities to take stock, assess progress, and redefine the direction based on the results for young children and their families. It also means that, when completed, a more traditional evaluation of program impact should not be a surprise. If data are considered along the way—and reflect the steps that need to occur to create change, an evaluation of impact will likely "reflect back" the data that is already known. When funding levels do not allow for large-scale impact evaluations, organizations can still take time to ensure they have a highly clarified, step-by-step logic model of how change is expected to occur. This reflection and alignment will help ensure that organizations focus on the right pieces of the work and resulting data are informative and linked to the idea of impact.

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Evaluation Learning

The Robins Foundation board and leadership made a choice in the beginning of their major investment that many small to mid-size foundations find themselves making: they put money into additional programming instead of evaluation. They were moved by the number of children needing assistance and their ability to make an immediate impact in the neighborhood more than by the costly endeavor of setting up an outside evaluation or investing in the infrastructure of a growing initiative. As an alternative, they asked the grantee to complete logic models and report on outcomes each quarter.

Our study of the Robins Foundation found that although the Foundation requested logic models, the outcome reports they were given did not directly map on to the original intent of the model, or speak to the connection between community needs and services. A missing thread was how all the partners worked together on behalf of the children in the neighborhood, and data on whether their coordinated effort made a significant difference other than what each might have achieved on its own. Measuring program outcomes can work well when a program intervention is straightforward and the inputs and intended result are clear, but an outcome reporting system is less useful for this type of complex collaborative or network model (BoardSource, 2017, Network Impact and the Center for Evaluation Innovation, 2014). In addition, it wasn't clear that partners were using the logic models as a management tool to set goals and continuously improve upon their work collectively.

The absence of objective evaluation did not prevent the Robins Foundation's board from expecting and requesting regular measurements of success or continuing to invest in an initiative they believed was impactful. But it meant that they never had a complete picture of how the initiative was evolving or the direct impact of the collaborative wrap-around model. They did receive Partnership reports about children their partner agencies had served, capturing, for instance, an increase in well-baby checkups for families with home visitors, or literacy gains for children in summer camp, and the employability skills of parents. These reports indicated that, within each of the six partner programs, work was taking place for families in Northside. But it was not clear that the innovative strand of their design—the comprehensive coordination—was taking place as intended, nor that the building they had erected for this purpose was facilitating this work.

A comprehensive outside evaluation earlier in the process might have shined light on how or whether the collective intervention worked over time to help a particular group of children be ready for school, or whether the kindergarten readiness rates were improved for children enrolled in the programs as a result of the intervention. The value added of the Robins Foundation's significant investment—their intended legacy at the neighborhood and building level—was difficult to assess, even with the data they had.

The continuity and availability of good data and reporting was further complicated by divergence from the fidelity of the original model by the Partnership for Families due to budgetary decisions, administrative transitions, and shifting priorities among the

program's leadership and partners. For example, over time, the intent to place children at the core and provide these same children and their families with wrap-around services became diffuse. The Partnership grew to serve families more generally, seeking to improve resident self-sufficiency and well-being through separate partner interventions. The optics of this expansion were good—the building was full and the partners were busy helping children and their parents—but the impact was increasingly unclear, as was the extent to which they were truly addressing community needs.

Putting Principle #3 to Work
The Assessment

One of the first steps the evaluation team took to track progress was to map the donor's intended impact of the original neighborhood change, and the resulting program design of the Partnership for Families some 13 years later. We then compared it with what was actually taking place on the ground and being measured. In addition to finding gaps in the data, the team saw that the original model was not followed consistently, and the data submitted reflected this disconnect. It took stepping back and reviewing the alignment to see the dissonance over time.

Our assessment found that what was taking place on the ground was not always aligned the Partnership's submitted reports or the donor's intent. As a result, there were high expectations and limited information about the impact of the collaborative nature of the Partnership model. The Robins Foundation had funded a coordinating entity and multiple partners to create a holistic web of support around children, and they were given data by the Partnership suggesting that lots of activity was taking place in the building to that end. They assumed that the model was working from the sum of the reports received, but we were unable to verify this assumption in our review.

The Practice Change

The current Robins Foundation leadership and staff are committed to learning. Using the data from the assessment and evaluation of the Partnership's process and programs, the Robins Foundation has reconsidered its approach to engaging with its community grantee partners and incorporated several revisions to its methods. Starting with its board of directors, the Robins Foundation team now more frequently reviews challenges and opportunities for both its partners and itself. Having the board's expertise and input on the initiative's history and next steps keeps children and families at the forefront.

The Robins Foundation changed its approach to managing other large grants as they reflected on the results of the evaluation and assessment of the Partnership. As the assessment process was winding down, Foundation staff presented the board with the option and recommendation to pause for a deep dive assessment into its other trademark grant program—the Community Innovation Grant (CIG). The CIG is a three-year old grant program designed to coax new innovative solutions to intractable community challenges with an unrestricted funding grant. While that new assessment is not yet complete, the

board and staff agree that taking the time and resources to listen, measure, and adjust is exactly the right course for the organization. At the same time, the Foundation is creating its own theory of change which emphasizes a high degree of community engagement and greater attention to research and evaluation.

Questions for Consideration for Intentional Evaluation

Through our experience as participants in this process, we recommend donors consider these questions when initiating a large-scale participatory investment.

(1) Is the organization tracking meaningful data, and how is it being evaluated?

(2) Does your foundation have the capacity to collect and analyze the data you receive?

(3) What mechanisms are in place for reflecting on learning from data and experience in partnership with grantees, and recalibrating when necessary?

In the case of the Robins Foundation, many of the elements we identified in our assessment would have turned up years before had it **commissioned a quality outside evaluator** earlier in the process. They might have known whether the building was meeting residents' needs, whether to build the center in the first place, and the extent to which vulnerable families were making meaningful progress over time. **Setting up parameters for ongoing measurement** in partnership with the nonprofit grantee, encouraging and/or **funding rigorous evaluation** every few years, and being willing to **reflect and learn** from the findings in a non-punitive partnership with your grantees are necessities for effective large-scale transformation.

Conclusion

A donor's ability to leave a successful legacy within a community lies in honest communication, delineating clear and equitable relationships with grantees, and a deep and thorough understanding of their home communities. It requires leaving room for a change of course as data and experience suggests a different direction. It means being explicit about power dynamics early on and developing agreements that spell out roles and decision making. It means going beyond traditional expertise and engaging those who will use the services—in our case, the families in Northside—in the formulation of the design and ongoing implementation.

While we acknowledge that many funders understand these principles intellectually, we found that recognition is not sufficient. It is necessary to operationalize and make explicit these principles—building equitable partnerships, supporting mutual learning, and evaluating with intent—throughout the course of a partnership with grantees. This involves giving up some control in order to create a trusting space where mutual learning is encouraged and supported.

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Donors experiencing setbacks to their large-scale efforts and legacy can "reexamine their goals and approaches, including how they engage the communities they aspire to help in the decision-making process." This is what the "best philanthropies" do. Alternatively, the comfortable route is to "retreat to seemingly safer donations…while others withdraw from public giving altogether." (Ditkoff and Grindle, 2017).

We offer these principles in hopes that local foundations will not retreat. Our experience leads us to believe that community change at the local level is achievable with these principles in mind. There is a balance to strike between protecting and defending the right of philanthropy to give with its own agenda and the recipient's flexibility to fully interpret and design the approach. Proactive giving needs to be countered with a more conscious and deliberate acknowledgement of the impact that the giving relationship and the funders' understanding of need has on the work. Preservation of a positive donor legacy requires it.

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