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# Marguerite Casey Foundation: Reflecting on 15 Years of Philanthropic Leadership Through a Summative Evaluation

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*Keywords: Marguerite Casey Foundation, movement building, poverty, philanthropy, evaluation, organizational learning*

## Key Points

- This article presents the findings of a summative evaluation of the Marguerite Casey Foundation that was conducted on the occasion of its 15<sup>th</sup> anniversary. The evaluation was designed to gauge stakeholders' perceptions of the foundation's operations to facilitate organizational learning. In sharing these results, the authors seek to elucidate the role of evaluation as a learning practice within the field of philanthropy.
- The article describes the foundation's organizational elements and evolution and discusses key themes that emerged from qualitative data collected from foundation leaders and staff, as well as findings from a survey of current grantees.
- The article presents a synthesis of the evaluation's findings and recommendations for the foundation's continued and future work, describes its initial responses to these recommendations, and concludes with thoughts regarding the foundation's continued progress toward establishing movement building as a philanthropic strategy for the 21<sup>st</sup> century.

## Introduction

Established in October 2001, the Marguerite Casey Foundation has sought to build a movement to transform the lives of poor families and children. The foundation's evolution has occurred in two overlapping and interconnected phases, described here as organizational development and movement building. Developing the organization involved establishing and refining the foundation's structure, mission, vision, and strategic approach; grantmaking guidelines; and theory of change. These key organizational elements have undergirded and guided the foundation's efforts to build a movement that supports poor families in becoming change agents in their communities and the larger society. Having just celebrated its 15<sup>th</sup> year, the foundation is entering a new phase of exciting possibilities.

This article draws from a summative evaluation commissioned by the foundation to mark this evolutionary milestone. The evaluation was designed to capture stakeholders' perceptions of the foundation's operations to facilitate organizational learning, which is defined as the "process of asking and answering questions that grantmakers and nonprofits need to understand to improve their performance as they work to address urgent issues confronting the communities they serve" (Grantmakers for Effective Organizations, 2009, p. 1). In sharing these results, the authors seek to elucidate the role of evaluation as a learning practice within the field of philanthropy.

The article is organized into six sections. It first provides an overview of the foundation's structure and movement-building strategy. A description of the methods used in the summative evaluation and their limitations follow. Drawing on the perspectives and voices of key stakeholders, including foundation leaders and staff, network weavers,<sup>1</sup> and current grantees, the third section describes the foundation's practices and impact. The fourth section presents a synthesis of the study's findings and recommendations for the foundation's continued and future work; this section is followed by a discussion of the foundation's initial responses to these recommendations and concluding thoughts.

## Organizational Development

The Marguerite Casey Foundation was established as an independent, private foundation with an initial endowment of \$600 million. Since its inception, the foundation has developed its structure; mission, vision, and strategy; grantmaking guidelines; and theory of change.

The foundation's organizational structure is composed of a board of directors (board), a president and chief executive officer (CEO), and leadership of four units: finance and investment, administration and human resources, communications, and grantmaking and evaluation. The board has nine members, whose diversity spans several dimensions including race and ethnicity, gender, age, and personal and professional experiences. It is responsible for ensuring that the foundation's leadership and resources match its mission and vision. The foundation's president and CEO provides leadership in establishing and implementing guidelines, policies, and procedures for communications, grantmaking, and daily operations. To achieve these objectives, she works closely with a staff of approximately 25 employees. The foundation's leadership team, composed of the president and CEO and unit directors, ensures that key decisions, initiatives, and issues are shared across the foundation and aligned with its mission, vision, and overall strategy.

*The foundation's mission is to build a movement led by poor families who are empowered to change their communities and lives.*

### *Mission, Vision, and Strategy*

The foundation's mission is to build a movement led by poor families who are empowered to change their communities and lives. This mission serves to achieve the foundation's long-term vision, adopted in 2003:

We imagine a just and equitable society for all, where all children are nurtured to become compassionate, responsible, and self-reliant adults; where families are engaged in the life of their communities, the nation, and the world; and where people take responsibility for meeting today's needs as well as those of future generations.

The foundation's vision is reflected in its strategic approach to change — the Equal Voice strategy, which has five components:

- Engage families to advocate on their own behalf for policy changes that improve the economic and social well-being of all families.
- Build strong cross-issue networks to share knowledge, organize constituencies of low-income families, and pursue policy-advocacy campaigns for change.
- Bring about change through successful policy reforms driven by low-income families.
- Develop skills and leadership among families in communities.
- Use resources to build organizations' capacity for movement building, including

<sup>1</sup>Network weavers facilitate collaborative action among members of the foundation's 14 Equal Voice networks.

## *The Equal Voice strategy, as well as the foundation's mission and vision, drive its grantmaking guidelines and theory of change.*

financial sustainability (Marguerite Casey Foundation, 2014).

These components reflect the foundation's recognition that to support a movement that gives visibility and voice to low-income families, organizations must work across issues, regions, races and ethnicities, and egos. The Equal Voice strategy, as well as the foundation's mission and vision, drive its grantmaking guidelines and theory of change.

### *Grantmaking Guidelines*

The foundation has several grantmaking guidelines. First, it does not accept unsolicited proposals, which are viewed as an inefficient use of time and resources for the foundation and most grant applicants (Marguerite Casey Foundation, 2014). Rather, it solicits funding proposals from specific organizations that embody the foundation's mission and the Equal Voice strategy. Secondly, the foundation works with cornerstone organizations in the 13 states with the highest concentrations of poverty, organized in four geographical regions: the South, Southwest, West, and Midwest.<sup>2</sup> Cornerstone organizations are those that play a central and sustained role in the activism of poor communities.

Third, through long-term general support grants, the foundation provides organizations with the flexibility to build internal capacity and refine their programmatic strategies in response to changing conditions. The foundation primarily awards 36-month, renewable grants in the range of \$300,000, although smaller grants over

shorter time frames are also provided. Fourth, the foundation follows a three-step process of grantee engagement and continuous improvement, which has become its brand promise: "Ask. Listen. Act." That is, in realizing its mission, the foundation adjusts its work as it asks questions of grantees and families, listens to their responses, and then acts.

Finally, the foundation takes a cross-issue approach to funding, which recognizes that the issues facing poor families are not discrete but interconnected and therefore require comprehensive and inclusive action (Vega-Marquis, 2012). The foundation's grantmaking guidelines are best understood within its theory of change, which has evolved alongside the organization.

### *Theory of Change*

The foundation first developed a theory of change in 2005, revised it in 2007, and did so again in 2014. Its most recently updated theory of change was the result of an interactive process that incorporated feedback from key stakeholders and guidance from experts in the field of organizational assessment. The updated theory of change depicts the causal chain linking foundation goals, core strategies, and anticipated outcomes. Important elements include the foundation's resources, brand promise, and its longtime commitment to using a racial-equity lens to guide its work. This lens is reflected in the composition of the board and staff as well as in its grantmaking and communications, which recognize and seek to dismantle the structural barriers to equity disproportionately faced by communities of color.

At the center of the theory of change are the foundation's overlapping strategies of grantmaking and communications, which are viewed as equally relevant to movement building (Vega-Marquis, 2014b). It is also informed by the knowledge that media representations of poor families have a direct influence on public attitudes and beliefs, and ultimately the policies that grantees seek to influence (Bullock, Fraser

<sup>2</sup>The foundation has also established a "national" funding category to support organizations whose work with poor families is national in scope.

Wyche, & Williams, 2001). The updated theory of change provides a road map for evaluating the foundation's processes and progress toward building a movement that elevates the voices of poor families. (See Figure 1.)

## Movement Building

In July 2002, the foundation prepared for its first year of grantmaking by commissioning 40 papers from practitioners, interviewing experts in the field of child welfare, and conducting listening circles in six cities that were chosen to reflect a diversity of regional, cultural, ethnic, and socioeconomic perspectives. Each listening circle was attended by an average of 100 participants, including community organizers and advocates, and representatives from government agencies and higher education institutions. Participants were asked: What creates strong families and children? What would it take to change the child welfare system and other systems that impact the lives of families and children? How would you leverage \$30 million a year to ensure the well-being of children, families, and communities? Findings from these activities consistently pointed to the need to focus on families and support organizations and their constituents in advocating for systems change (Marguerite Casey Foundation, 2014).

In 2005, the foundation commissioned additional research in the form of a survey of 1,500 families, the majority of whom were living near or below the federal poverty threshold. The survey revealed that the overwhelming majority of participating families were uncertain how to address the economic marginalization that they understood to be structural (Vega-Marquis, 2014a). This finding further underscored the need to provide resources to support grantees in empowering and mobilizing disengaged families. Collectively, these data-gathering initiatives laid the groundwork for a milestone in the foundation's movement-building efforts — the Equal Voice for America's Families Campaign.

### *The Equal Voice for America's Families Campaign*

In 2007 the foundation assembled a group of grantees, referred to as the movement-building study group, to consider the question: What would it take to spark and sustain a movement that elevates the voices of poor families across the many issues that impact their lives? The study group's response was to directly ask poor families. This led to 65 town hall meetings where 15,000 participants discussed their greatest concerns and identified eight interrelated issues integral to a comprehensive approach to address the challenges families face. These issues — child care, criminal justice reform, education, employment and job training, health care, housing, immigration reform, and safe and thriving communities — were used to develop the Equal Voice National Family Platform with related recommendations for local, state, and federal policy changes. In September 2008, the foundation gathered another 15,000 families in three locations (Chicago, Los Angeles, and Birmingham, Alabama), connected through technology, to ratify the platform. In 2009, a delegation of 150 families presented the platform to elected officials in Washington, D.C. (Marguerite Casey Foundation, 2012).

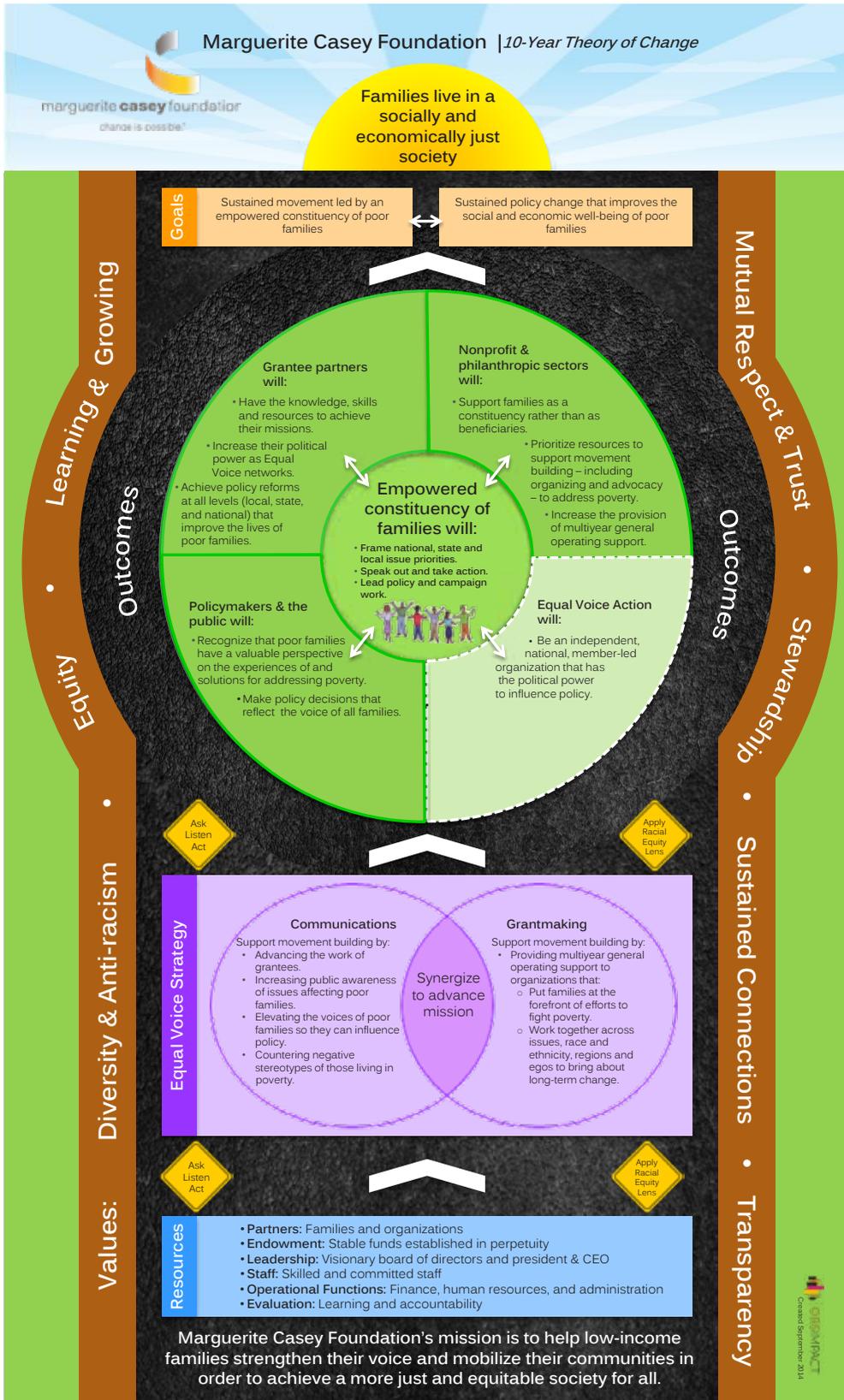
### *Strengthening Movement Building: Post-Campaign Activities*

Since 2008, the foundation has engaged in several activities that have advanced its movement-building efforts. It has expanded its two, initial subregional Equal Voice networks, in the Rio Grande Valley and the Mississippi Delta, to 14–13 networks in nine states in four regions, and one national network. These networks promote intergrantee communication and collective action across issues with the support of network weavers, whose work is funded by grants from the foundation but who are hired by and report to their respective networks (Nyhan, 2016).

In 2009, the foundation created *Equal Voice News*, an award-winning, online news source for in-depth coverage of grantees' work and policies that affect poor families.<sup>3</sup> The communications

<sup>3</sup>In 2016, *Equal Voice News* received a second-place award from the Society for Features Journalism, in the Division Three video storytelling category, for its story "The Dignity of Living: America's Home Care Aides." See <https://featuresjournalism.org/sfj-28th-annual-award-winners-by-category/>

**FIGURE 1** Marguerite Casey Foundation 10-Year Theory of Change



team also uses social media, targeted campaigns, grantee profiles, the foundation's monthly newsletter, news stories, and the *Equal Voice* quarterly magazine to influence coverage of issues of national importance to low-income families and build support for the foundation's mission.

In addition, the foundation is building a critical mass of youth leaders. Specifically, it partnered with grantees to create a youth-engagement project and developed a documentary, *Maria Full of Hope*, and companion youth-empowerment toolkit.<sup>4</sup> In 2012, the foundation also began to recognize youth leaders dedicated to improving the lives of families and their communities with the Sargent Shriver Youth Warriors Against Poverty Award.<sup>5</sup>

The foundation has also continued to hold local, regional, and national convenings to facilitate stakeholder interaction and collaboration (Wong, 2016). In 2012, for example, the foundation held an online convention that brought together 15,000 families connected via phone, social media, and in person to collectively revise and expand the Equal Voice National Family Platform. (See Figure 2.)

Finally, the foundation identified five indicators of successful movement building within the Equal Voice framework — policy impact, family engagement, network development, organizational capacity building, and leadership development — that serve as important measures of progress:

- Policy impact refers to policy reforms (passing or blocking a policy as well as preventing cuts or other changes) at all levels — local, regional, and national — that improve the well-being of families.
- Family engagement consists of families defining issue priorities and being actively involved in policy and campaign work.
- Network development refers to how successfully grantee organizations sustain relationships with families and other groups to build power and coordinate efforts to bring about change.
- Organizational capacity is the degree to which organizations have the skills, knowledge, leadership, and resources to achieve their missions.
- Leadership development refers to how successfully families are provided with education and training to empower them to speak out and take action, be recognized as spokespeople in their communities, and educate others.

**FIGURE 2** 2012 Equal Voice National Family Platform Issues

- Child care
- Criminal justice reform
- Education
- Elder care
- Employment/job training
- Environment
- Food security/  
access to healthy food
- Health care
- Housing
- Immigration reform
- LGBT rights
- Transportation
- Youth engagement

**Note:** For full description of issues, see <http://caseygrants.org/equalvoice/national-family-platform/>

<sup>4</sup>See <http://caseygrants.org/hope/index.html>

<sup>5</sup>To learn more about this and other foundation awards, see <http://caseygrants.org/about-us/awards>.

## *The primary goal of the summative evaluation was to provide a holistic understanding of stakeholders' perceptions of the Marguerite Casey Foundation as a change agency seeking to empower poor families.*

Thus, with 15 years of progress behind it, the foundation saw 2016 as an opportune time to reflect on its work to date and contemplate next steps toward realizing its mission and vision. The summative evaluation was designed and written to facilitate this learning process.

### Evaluation Methods

The primary goal of the summative evaluation was to provide a holistic understanding of stakeholders' perceptions of the Marguerite Casey Foundation as a change agency seeking to empower poor families. Accordingly, the evaluation employed a multisource, multi-method approach.

After an extensive review of the foundation's literature, including newsletters, reports, and web-based materials, primary data collection began in October 2015 and occurred over six months. Data-collection activities involved:

- semi-structured, individual interviews with the foundation's president and board,
- focus group and individual interviews with the foundation's leadership team and staff,
- a qualitative survey for network weavers, and
- a quantitative survey with open-ended questions for current grantees.

These activities resulted in the collection of qualitative and quantitative data from 11 foundation leaders and 20 staff members, 12 network weavers, and 139 current grantees. Data were analyzed as described below.

- **Qualitative data analysis.** The 31 audiotaped interviews and 12 qualitative surveys were transcribed into Microsoft Word files and imported into Ethnograph 6.0, a qualitative data-analysis software program, for coding. Coding proceeded using first deductive and then inductive strategies. Some codes were created prior to the categorizing stage of data analysis based on evaluation objectives. Other codes emerged from the process of reading and rereading the transcribed interviews. A total of 50 primary and secondary codes were generated. After initial coding, the authors met to discuss their impressions and reduce the codes to key themes related to the foundation's current activities and future development.
- **Quantitative data analysis.** Of approximately 187 current grantees, 139 (74 percent) responded to a confidential online survey about their perceptions of the foundation. A database was created using Stata 14 and analyzed in four stages. First, seven perception scales were created.<sup>6</sup> Then, overall scale scores and items were analyzed using exploratory descriptive statistics. In the third stage, grantee data were examined across key dimensions: geographical scope — South, Southwest, West, Midwest, and national; organization size, as defined by number of paid, full-time employees; years of operation; and years of funding. Finally, open-ended responses were coded and integrated into the quantitative analysis to supplement survey results and expand understanding of grantees' perceptions.

While extensive data were collected, limitations of the research design and approach are important to consider when interpreting the findings. Specifically, researchers strived to reduce

<sup>6</sup>All scales have strong internal consistency, ranging from 0.81 to 0.95.

positive bias toward the foundation by ensuring confidentiality and anonymity. However, participating grantees are currently receiving funding, which may have reduced the likelihood of critical responses. Recognizing this limitation, the researchers were especially attentive to options clustered around seemingly neutral responses (“slightly agree” or “slightly disagree”). Moreover, surveys, by design, limit stakeholders’ responses. To address this limitation, the researchers included open-ended questions that allowed participants to share comments and concerns outside of their responses to the closed-ended items.

Additionally, while interviews and focus groups provide excellent opportunities to gather in-depth information from key stakeholders, they, too, may be limited by participants’ desire to share positive information. This is especially true in focus groups, where participants may fear appearing disloyal or critical in the presence of other colleagues. We attempted to address this limitation by conducting confidential individual interviews with as many respondents as possible. In addition, specific questions were included in the focus-group interviews to prompt consideration of challenges and areas for improvement as well as accomplishments. Thus, while limitations were present, efforts were made to generate findings useful for the purpose of organizational reflection and learning. These are shared in the following section.

### **Findings: Perceptions of Leaders, Staff, and Network Weavers**

Drawing on responses from foundation leaders and staff and from network weavers, three themes emerged to describe the foundation and its overall performance: organizational climate, defined as the conditions within the foundation as experienced by key stakeholders; perceptions and support of grantees; and accomplishments and areas of impact.<sup>7</sup>

*[T]hree themes emerged to describe the foundation and its overall performance: organizational climate, defined as the conditions within the foundation as experienced by key stakeholders; perceptions and support of grantees; and accomplishments and areas of impact.*

#### *Organizational Climate*

Participants identified four characteristics that defined the foundation’s organizational climate: mission, diversity, support, and collaboration.

1. **Mission.** The foundation was widely described as ethical and mission-driven, a sentiment expressed across participants regardless of their roles, professional experiences, and years with the foundation. They valued the foundation’s mission and closely identified with it, commenting on its “complexity,” “boldness,” and “breadth” and describing it as “motivating” and “gratifying.”
2. **Diversity.** Participants also favorably viewed the foundation’s commitment to diversity, which they noted was visible throughout “every level” of the organization. One board member remarked on “the deliberate and open perspective and priority around diversity, not only in program work and how the grants are made, but in the leadership and personnel of the organization itself.” While this commitment has presented staffing challenges, given the foundation’s location

<sup>7</sup>Themes are presented to reflect participants’ perceptions in a holistic, rather than quantifiable, manner. Direct quotes are used to provide evidence of and illustrate these themes. A similar approach was taken when describing grantees’ open-ended survey responses.

*Participants especially valued three key areas of grantee support: long-term general funding; the “Ask. Listen. Act.” brand promise; and network support. Each area was seen as having a positive impact on movement building.*

in a state with limited racial and ethnic diversity,<sup>8</sup> its persistence and success were seen as distinguishing features.

3. Support. Staff members also reported that they felt supported by the foundation; one participant observed that it “takes really good care of its people.” Staff especially valued the fair and competitive compensation and opportunities for transitions within the organization as their interests and skills evolved.
4. Collaboration. Participants also described the foundation’s climate as caring and collaborative; teamwork and collegial support were commonly identified features of the work environment. One staff member observed that when conflicts arise, staff “don’t get stuck in the problem, they get stuck in the solution.”

*Perceptions and Support of Grantees*

Participants also identified the foundation-grantee relationship as central to the foundation’s identity and work. At the core of its work is the selection and support of grantees and the strengthening of their work through regional networks. Qualitative interview and survey data indicate that participants valued and were inspired by grantees. In particular, staff members described them as “partners” and said

that building trusting relationships was “key to advancing an agenda to eradicate poverty.”

Participants especially valued three key areas of grantee support: long-term general funding; the “Ask. Listen. Act.” brand promise; and network support. Each area was seen as having a positive impact on movement building.

1. Funding. One network weaver described the foundation’s approach to grant funding as “ingenious.” Board members viewed it as a sign of trust: As one member said, the foundation “is willing to give support to an organization without strings attached; that gives power to that organization. The [organization] is being trusted.”
2. “Ask. Listen. Act.” The foundation’s brand promise — asking questions and listening to the responses of grantees and families before “acting” — was also viewed positively. A staff member described grantees’ response to this promise: “We go into places and you can tell that they anticipate that we’re going to talk with them and listen to them about the work that they do. We’re not coming in to tell them what to do.”
3. Network support. The foundation’s support for regional networks and network weavers was also viewed as noteworthy. Participants remarked that this support was empowering rather than prescriptive, aligned with the foundation’s principles of mutual trust and respectful engagement with grantees. Network weavers agreed; one stated, “I appreciate the way this foundation operates. They support real organizing and they don’t dictate how their grantees or their weavers do the work ...!” While valuing the support provided, some network weavers expressed the need for additional assistance, especially in the area of communications, “to better tell ... [their] stories to decision makers.”

<sup>8</sup>For Washington state population demographics, see <http://www.census.gov/quickfacts/table/PST045215/53>.

### Accomplishments and Areas of Impact

Finally, participants identified a number of significant accomplishments that have advanced the foundation's goal of establishing a transformative movement that centers on the voices of poor families: policy impact, network development, leadership development, strategic communications, incubation of a membership organization, and influence in the field of philanthropy.

1. Policy impact. Participants identified grantee and network impact on policies central to the Equal Voice platform as key accomplishments. They cited statewide policy wins in California<sup>9</sup> and local policy wins — especially in the South and Southwest, where grassroots organizing and community mobilization are not as well developed or funded. While participants noted the importance of these policy wins, they also recognized their tenuousness and the need for continued work by grantee organizations and networks to create lasting change.
2. Network development. The foundation's support for regional networks and network weavers was also seen as noteworthy. A staff member said, "I think one of the biggest accomplishments of the foundation has been the creation of the Equal Voice networks. It has brought regional organizations together under one goal, and that's to move low-income families out of poverty."
3. Leadership development. Specifically, participants noted the foundation's impact on the development of grassroots leaders and the creation of a pipeline for these leaders to move into elected positions on city councils and in state legislatures. Other participants were especially proud of the foundation's youth-leadership initiatives, which they saw as critical to sustaining movement building.
4. Strategic communications. Participants identified the foundation's communications strategy as a key accomplishment. One staff member singled out *Equal Voice News*, "which always tries to elevate the voices of families, especially working and low-income families and individuals." The overlapping roles of communications and grantmaking in the foundation's movement-building efforts was also noted.
5. Incubation of a membership organization. The incubation of an independent, 501(c)(4) national membership organization, known as Equal Voice Action, is viewed as a strategy to complement the foundation's existing work to elevate the voices and expand the power of families and communities in poverty.
6. Influence on the field of philanthropy. Participants viewed the foundation as an innovative and leading-edge organization, and were committed to demonstrating the merits of its philanthropic approach. A staff member explained, "We are in social justice philanthropy and ... we have a role to play in being visible and making sure that we're showing the [Equal Voice] strategy works." To realize this role, another staff member observed, the foundation must expand its outreach to external audiences.

While acknowledging that the foundation's mission is not complete, participants were enthusiastic and optimistic about its progress to date. These sentiments were largely echoed by current grantees.

### Findings: Perceptions of Current Grantees

The foundation has provided financial support to approximately 450 organizations whose primary mission has been to empower poor families in a national fight against poverty, and currently funds about 187 grantees in regional and national

<sup>9</sup>With the passage of Proposition 30 in 2012, Californians temporarily raised tax rates to help prevent more than \$5 billion in education cuts and restore the fiscal health of schools. Proposition 47, passed in 2014, reduces certain drug-possession felonies to misdemeanors.

portfolios.<sup>10</sup> Below, grantees' responses are organized using the seven perception scales, which also represent components identified in the literature as relevant for building productive and sustainable relationships between funding agencies and grantees (Foster & Ditkoff, 2011).

Current grantees' general impressions of the foundation were overwhelmingly positive (mean score = 5.58 out of 6). (See Figure 3.) Of note, more than two-thirds of grantees strongly agreed with items concerning the foundation's trustworthiness, contributions to the well-being of poor families and children, and expertise in the condition of poor families. Grantees' positive perceptions were clear in their qualitative responses as well; they described the foundation with adjectives such as "critical," "precious," "instrumental," "progressive," and "invaluable."

Grantees' perceptions of the Equal Voice strategy were largely positive, but less so than their general impressions of the foundation (mean = 4.92 out of 6). (See Figure 4.) Respondents showed higher levels of agreement with the two items measuring their knowledge about the Equal Voice strategy than with the two others, measuring their attitudes (5.15 and 4.91 versus 4.77 and 4.78). Specifically, items concerning the role of the Equal Voice strategy for focusing grantees' work and making them feel part of a national movement had the highest levels of slight agreement, and about 10 percent of respondents reported slight disagreement. Mixed perceptions about the Equal Voice strategy were also reflected in grantees' open-ended survey responses. A majority of grantees recognized the importance of the strategy for connecting with other grantees and gaining visibility. However, others voiced uncertainty and the need for clarifying information (e.g., "The Equal Voice strategy and structure has been a little confusing sometimes").

Current grantees' perceptions of shared goals and alignment with the foundation were

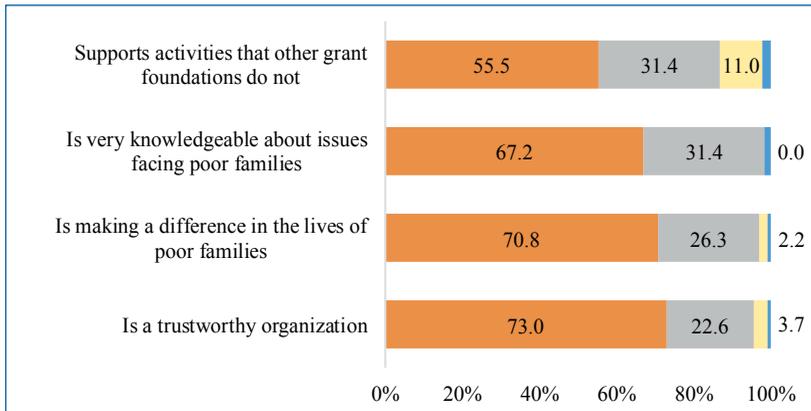
overwhelmingly positive (mean score = 5.53 out of 6). (See Figure 5.) About two-thirds (63 percent) of participating grantees strongly agreed that their organizations share the foundation's mission and goals. One grantee, for example, observed, "Our organization practices undoing racism in all aspects of our work. These principles are in tandem with the mission and goals of the foundation." However, lower levels of strong agreement were observed concerning their own understanding of the foundation's mission and goals (48 percent), awareness of its activities and initiatives (46 percent), and whether the foundation is going in the right direction (44 percent).

Grantees also valued the foundation's support for their organizational functioning (mean score = 5.53 out of 6). (See Figure 6.) About 90 percent of grantees strongly agreed that the funding makes their work possible and is relevant for expanding or deepening their work. Likewise, nearly two-thirds strongly recognized the relevance of the funding to helping them meet their objectives. Items concerning the foundation's support for increasing visibility and networking, although still favorably perceived, had the lowest levels of strong agreement (44.5 percent and 47.8 percent, respectively). Qualitative responses corroborated grantees' positive perceptions. According to one respondent, "Funds from [the foundation] are critical to our organization's ability to stay agile and respond to community concerns in a way that matters."

Current grantees positively viewed the foundation's understanding of their organizations (mean score = 5.33 out of 6). (See Figure 7.) One participant stated that the "Marguerite Casey Foundation has supported our work by always being understanding of [our] mission and finding ways to connect us with opportunities to fulfill our mission." The lowest level of strong agreement (40 percent) was observed regarding the foundation's understanding of the challenges inherent in their organizations' work.

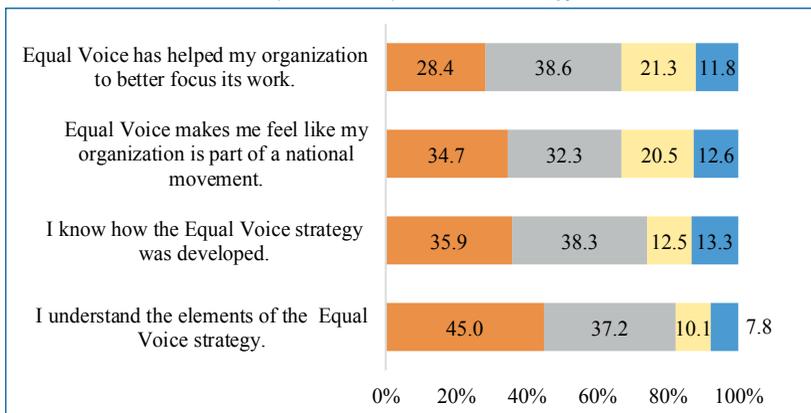
<sup>10</sup>Unlike the regional portfolios, which consist primarily of cornerstone organizations, the national portfolio includes a variety of groups – philanthropic infrastructure organizations, policy-research institutes, national organizing networks and advocacy organizations, and technical-assistance providers.

**FIGURE 3** Grantees' General Impressions of the Foundation



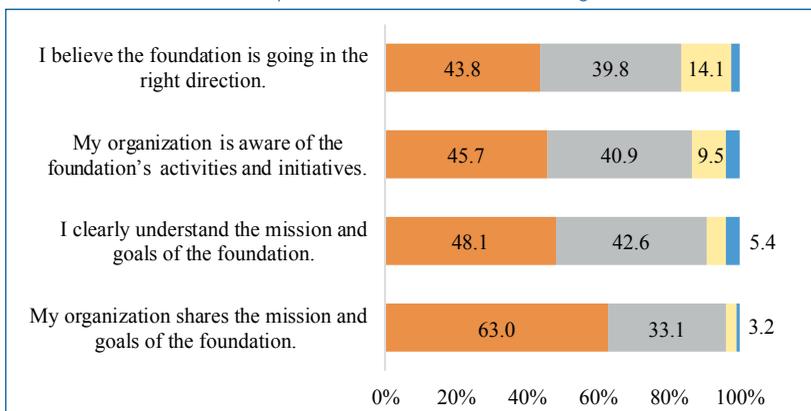
Note: Total may exceed 100% due to rounding; 1.44% (2) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for the last category were excluded from the figure due to small size.

**FIGURE 4** Grantees' Perceptions of Equal Voice Strategy



Note: Total may exceed 100% due to rounding; 6.5% (9) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence.

**FIGURE 5** Grantees' Perceptions of Shared Goals and Alignment



Note: Total may exceed 100% due to rounding; 6.5% (9) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for last category excluded from figure due to small size.

**KEY**



**FIGURE 6** Grantees' Perceptions of Support for Organizational Functioning



Note: Total may exceed 100% due to rounding; 1.44% (2) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for last category excluded from figure due to small size.

**FIGURE 7** Perceptions of Foundation's Understanding of Grantees



Note: Total may exceed 100% due to rounding; 5.76% (8) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for last category excluded from figure due to small size.

**KEY**



Grantees' level of understanding of foundation processes and procedures was high (mean score = 5.25 out of 6). (See Figure 8.) Around half of grantees strongly agreed that the criteria for funding are clear and that the foundation clearly communicates its accomplishments. However, about 40 percent of these grantees strongly agreed with the items measuring their understanding of foundation expectations for their performance and procedures for evaluation.<sup>11</sup>

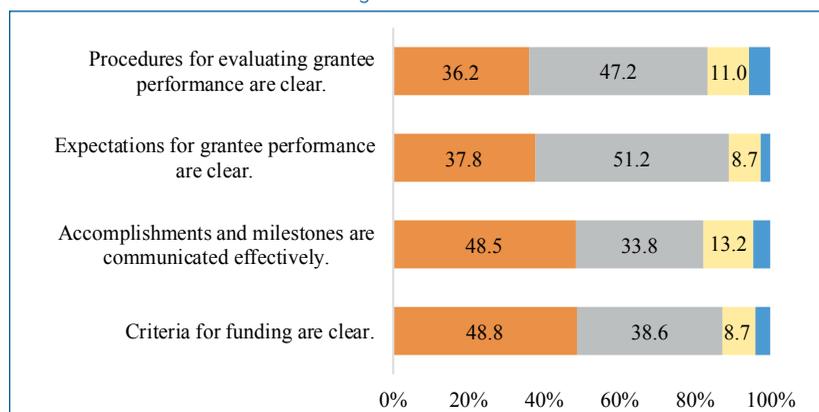
Overall perceptions of the grantees' relationships with foundation personnel were overwhelmingly

positive (mean score = 5.45 out of 6). (See Figure 9.) Around 55 percent of participating grantees strongly agreed with items concerning foundation personnel's level of responsiveness and knowledge, and responses to the open-ended survey questions reflected these findings. When describing foundation personnel, grantees used adjectives such as “sincere,” “passionate,” “attentive,” “willing to support,” “available,” and “helpful.”

While responses to the grantee survey were generally very positive, further analyses of the data revealed some differences among groups

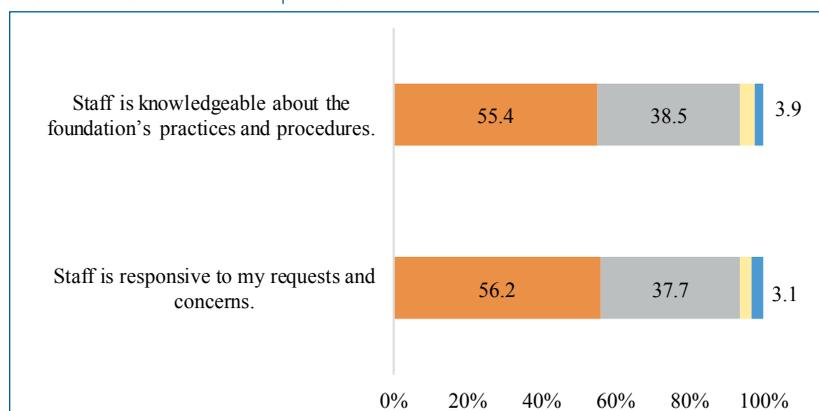
<sup>11</sup>No open-ended comments were reported for this section.

**FIGURE 8** Grantees' Understanding of Foundation's Processes and Procedures



Note: Total may exceed 100% due to rounding; 1.44% (2) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for last category excluded from figure due to small size.

**FIGURE 9** Grantees' Perceptions of Relations With Foundation Personnel



Note: Percentages total 100; 6.47% (9) missing cases. Responses ranged from 1-“strongly disagree” to 6-“strongly agree”; all negative responses were collapsed to “slightly disagree or less” due to their low incidence. Percentages for last category excluded from figure due to small size.

**KEY**



of respondents. Specifically, national grantees reported less-positive scores on all the scales, including perceptions of support from and connection to the foundation.<sup>12</sup> In addition, participating grantees who have received foundation funding for more years generally reported higher levels of knowledge and understanding of its guiding principles, approaches, guidelines, and procedures than did newer grantees. They were also more likely to report that the foundation understood their organizations' goals, concerns, and challenges.

**Recommendations**

In its first 15 years, the Marguerite Casey Foundation has achieved substantial progress in the interconnected areas of organizational development and movement building. It has established its mission, vision, and an overall strategy — Equal Voice. It has also developed innovative grantmaking guidelines, evolved its theory of change, and identified five indicators of movement-building progress within the Equal Voice framework to help guide its grantmaking and evaluations. Additional progress has focused on

<sup>12</sup>These results may be partially explained by differences between the regional and national portfolios.

## *Demonstrating the significance of evaluation as a learning tool, the foundation has developed several initiatives in response to the recommendations of this summative evaluation.*

movement building. Specifically, the foundation has developed the Equal Voice National Family Platform, a comprehensive agenda for policy change, with the guidance and input of tens of thousands of low-income families. It has built 13 regional networks and one national network and provided support for network weavers. The foundation has also developed a communications strategy and infrastructure that is synergized with grantmaking to advance its mission.

These accomplishments embody key elements of movement building as described by policy consultants Barbara Masters and Torie Osborn (2010): organizing an authentic base of individuals and communities “affected by the social conditions that the movement is seeking to change” (p. 16); vision and ideas that provide a common narrative and clear objectives for the role of government; alliances that facilitate work across issues and organizations; and an advocacy infrastructure with a range of skills, resources, and expertise to close the gap between communities and the “seats of power” (p. 22). Recognition of these accomplishments and overwhelming support for the foundation’s continued efforts characterized the evaluation’s findings. However, areas for organizational improvement also emerged. Most prominent among these were suggestions for enhanced relationships and communication among the foundation, grantees, and network weavers.

The evaluation findings suggest that while grantees appreciate the support of the foundation and identify with its mission, for some, there is a gap in their understanding of the

foundation’s procedures, expectations, and activities. Other grantees reported a similar gap in the foundation’s understanding of the complexities inherent in their work. As Buteau and Buchanan (2013) contend, when building collaborative relationships with grantees it is very important to have the right balance and frequency of interactions. Some grantees believed that the foundation has achieved both, but a smaller group of grantees and network weavers expressed the need for additional support. Thus, as the foundation reflects on its future engagement with grantees and network weavers, type, balance, and frequency of interactions are areas for consideration.

To further advance the foundation’s communications strategy, participants identified three areas for continued and future work. One area is to help build the capacity of networks to better craft and communicate their “stories” in order to advance their agendas. Another is to review messaging and materials to ensure that all grantees understand the different strategies and tactics that share the Equal Voice brand: Equal Voice strategy and framework, Equal Voice networks, Equal Voice National Family Platform, *Equal Voice News*, and Equal Voice Action. A third area is to identify communication strategies that will continue to broaden the foundation’s audience and expand its influence in the field of philanthropy. Thus, as the foundation moves forward, thinking through how it will effectively meet its own communications needs as well as those of its grantees and networks should be key focus areas.

### **The Foundation’s Response**

Demonstrating the significance of evaluation as a learning tool, the foundation has developed several initiatives in response to the recommendations of this summative evaluation. In particular, it has sought to further strengthen grantee/foundation relationships and expand its communication efforts. To promote more frequent and consistent contact with staff, for example, the foundation has restructured its grantmaking unit to form “cross-regional teams.” Each team includes two program officers and a program assistant, and works closely with two regions

to foster more cross-regional communication and analysis, provide peer support to program officers, and guard against silos. While each program officer remains the lead for a particular regional portfolio, they now partner with a co-program officer to share knowledge and experience across regions.

Less-positive perceptions of support from and connection to the foundation by national grantees were also important findings. In response, the foundation has reorganized the management of the national portfolio, which is now shared among program officers to strengthen connections between national and regional grantees. This new arrangement will also allow the foundation to better leverage the expertise and resources of national grantees to deliver assistance to regional grantees.

To further enhance communications with grantees and build on its existing assessment strategies, the foundation has instituted a relationship management tool. The tool ensures that program officers have regular conversations with grantees about their activities, changes in staff or leadership, and issues related to governance and finances. It thus provides program officers with critical information to assess grantees' organizational health and effectiveness.

In response to the confusion about the Equal Voice brand among some respondents, the communications team is working with all staff to ensure continuity and clarity of message. And finally, the foundation is shifting its communications efforts to broaden its audience and advance its role as a philanthropic leader, while remaining committed to featuring the work of grantees and networks and elevating the voices of low-income families.

## Conclusion

The immensity and complexity of movement building has required that the Marguerite Casey Foundation embody its brand promise to “Ask. Listen. Act.” Its 15th anniversary summative evaluation was conducted to facilitate this ongoing commitment to continuous improvement.

Based on the evaluation results, strengthening foundation/grantee/weaver relationships and communications were identified as key areas for improvement. After reflecting on these recommendations and other findings in the report, the foundation has begun several initiatives to address these areas. It thus demonstrates the important role that a summative evaluation can play in assisting philanthropic foundations to better understand and respond to the needs of their grantees as they work to address the urgent issues of our time.

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