

# Philoptima Newsletter: "The Strategic Philanthropist"

Interview

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## **BACKGROUND: The Rhode Island Foundation (TRIF)**

The Rhode Island Foundation was founded in 1916 and, with more than \$500 million in assets, is one of the nation's largest charitable organizations serving a specific geographic area. In 2004, the foundation introduced its "Strategy Grants" support projects that address significant community challenges in six sectors, strive for lasting impact, and serve disadvantaged Rhode Islanders. For each of the six sectors, the foundation developed a strategic focus on an important issue or concern that its available grant resources can most effectively address. The foundation clusters much of its grant investments for maximum impact – creating opportunities for more productive evaluation, convening of grantees, and other types of assistance.

Stylistically, the foundation uses a mix of approaches: innovative and sustainable ideas, strong nonprofit organizations and leaders, and organizing and advocacy within each sector. Each approach involves tailored indicators and tracking systems based on clearly defined expectations.

## **Our Special Guests:**

- Owen Heleen, Vice President, Grant Programs, The Rhode Island Foundation  
Owen Heleen, was recently promoted to his current position overseeing all grant programs for The Rhode Island Foundation (TRIF) in Providence. He previously served as Senior Community Philanthropy Officer having joined the TRIF staff nine years ago as Evaluation/Special Projects Officer. During his tenure, Owen has been very involved with "Hispanics in Philanthropy", has managed collaborative programs with the Bill & Melinda Gates Foundation, and has served as acting Executive Director of a small community foundation in Massachusetts.

Heleen is also the Foundation's lead grantmaking staff member for the health sector, with oversight for the new "Fund for a Healthy Rhode Island". Prior to joining the Foundation, Heleen was director of development of the Providence Public Schools and vice president of the Boston-based Institute for Responsive Education. Heleen grew up in New Bedford, Massachusetts and holds an undergraduate degree from Johns Hopkins University and a master's degree from Boston University. In his role overseeing all grant programs for TRIF, Owen works closely with Mr. Neil Steinberg, President, in setting the strategic direction for the foundation.

- Denise M. Jenkins, Grant Program Officer, The Rhode Island Foundation  
Denise Jenkins has been a Grant Program Officer at TRIF since February 2007. From 1991 to 2006, she served as head of "School One", an independent high school in Providence. From 1988 to 1990, Denise worked at the "Opportunities Industrialization Center of Rhode Island". She currently serves as a commissioner of the New England Association of Schools and Colleges and is a trustee of the Roger Williams University. She earned a bachelor's in psychology from Barrington College and a degree in nonprofit management from Bryant College. In her role as Grant Program Officer, Ms. Jenkins oversees a range of TRIF grants in education including public charter schools.

### **Topic: Strategic Philanthropy**

**Note:** On a recent vacation, we caught up with Owen Heleen and Denise Jenkins of the Rhode Island Foundation and grabbed some time to discuss strategic philanthropy.

**TSP:** How do you define "strategic philanthropy"? The Rhode Island Foundation, after all, has quite a reputation for carefully crafted grant programs with high-yield results.

**Owen:** The tap root of strategic philanthropy is knowing what you want to get done. The dynamics of engaging a community demand it. Our President, Neil Steinberg, is very skilled at matching this dynamism to our skills, talents, and resources. We are pleased to be a part of this team because our strategic approach keeps us from adopting grandiose goals (or none at all). Developing a strategic plan is a well tempered balancing act that involves everyone; staff, community, and trustees. It is a process we are comfortable with but it takes years to produce strong results. It's certainly not a "flash in the pan" or faddish approach.

**TSP:** It sounds like your approach isn't just about the money. So many people, including many foundation leaders, think it is.

**Owen:** Our strategy is equal parts "money" and "staff support". My experience is that senior program staff add immeasurably to the impact we can have above simply funding a nonprofit organization. A high-performing team of people with serious field experience actually helps us avoid wasting money while boosting performance. It's a win-win.

**TSP:** But as a community foundation, you must pay attention to marketing and finding new donors too. It sounds like your staff is as important as your grants.

**Owen:** Yes, our staff is critical to our success in many ways. For instance, an additional role for community foundations is to help donors looking for an in-depth understanding of a particular field. We can only do this by recruiting and retaining top-notch people.

So, we need experienced talent for both sides of the coin, supporting donors and teaming up with grantees.

**TSP:** It seems that the trick to strategic philanthropy is a combination of staff expertise and money, am I right?

**Owen:** Admittedly, for strategic philanthropists, much of our influence comes from the work on the ground from our staff and careful money management. But, our strategic impact is enhanced just as much by having the self-discipline to avoid using a scatter-shot approach. It's all too easy to lose our focus in this work; game-changing strategies often take years of close attention and patience so what you avoid spending money and time on is just as critical as what you do-.

**TSP:** One target of your strategic work is in public education. Do you have specific ideas about what you want to accomplish?

**Owen:** Our goal in education is to reduce the number of students dropping out of school, and to increase the number of high school graduates who go on to post-secondary education or job training programs. This is a very specific area of focus as compared to the general rubric of "education". We find that this specificity helps us perform at a higher level.

**Denise:** Let me jump in here and add that we are very focused on middle school and high school retention as a sub-set of our education strategy. Our grant programs support practices that motivate kids to learn, to reach graduation and to seek further educational opportunities.

**TSP:** You do a lot of work with charter schools. Isn't it a little edgy for a community foundation to push for radical change?

**Owen:** Our strategy of systems change in education is multi-layered and spread across several years. Charter schools are just one way among many of approaching systemic educational improvement. We are not rabid about charter schools; we are rabid about helping children succeed.

**Denise:** Regarding charter schools specifically, we support best practices for all schools and we think that charters have a lot to share with other schools and districts. Dissemination of information from charter schools to the larger educational environment is an important means of gaining overall improvement. We spend a lot of time in this knowledge transfer role.

**TSP:** Can you give me an example of how you use charter schools to help all other public schools?

**Denise:** Sure, as a component of our work in larger schools and districts, including charter schools, we support professional development and mentoring programs for

educational leaders. This is a perfect fit with our overarching strategies which amplifies our ultimate impact on student achievement.

**TSP:** It sounds like a lot of work for the foundation when you pursue big challenges.

**Denise:** Well, it is hard work but understanding the big picture helps us all do our job better. As an example, we played an important role in the transfer of knowledge across a range of different school types when the professional development of teachers was adopted as a best practice among our high-performing school leaders. Foundations like ours really do have an obligation to share what they learn when they support programs like this and we take this role quite seriously.

**TSP:** I notice you have a school leader mentoring program. Did you adopt this strategy because your staff had a certain skill set or was it really what was needed to eventually improve public education?

**Denise:** I am a former school principal so I have a certain feel for the challenges that school leaders face. They need a strong, confidential, mentoring relationship with experienced colleagues to survive and thrive in their jobs. But, we don't support programs like this just because I've been there, we do it because it is an important part of a larger strategy in education that is tightly knit to the ultimate goal of constantly improving student achievement.

**TSP:** In the larger sense, Rhode Island is a relatively compact state so I might assume it's policy-makers are more responsive to change. Do you need to focus on influencing public policy in addition to improving things at the school level?

**Owen:** Advocacy is a very important part of our strategic toolkit. As an example, charter schools receive considerable financial support per pupil from the state but it took a lot of advocacy effort from several fronts over several years for the system to adopt an approach of the "money following the student". Today, per pupil funding moves from the originating or "sending" school to the charter. This could only happen with a lot of non-partisan education and lots of collaborating forces.

**TSP:** So you step out front when you think a public policy needs to change?

**Owen:** Well, it's partly about visibility but a bigger part of any advocacy strategy involves the "convening", "introducing", and "informing" roles of a foundation. These are non-partisan permissible activities that are equally crucial to successful civic engagement.

**TSP:** Some people spend a life time in this work and never really have the impact they hoped for. How do you know when you are making a real difference?

**Denise:** You cannot minimize the importance of good program evaluation if you want to answer this question. We are much more attuned to evaluation results today than ever.

Without careful data collection and evaluation, how would we ever understand our impact or adjust our processes? In charter schools, we don't just measure student achievement (as important as it is). We also measure dropout rates, attendance, graduation rates, school climate, and suspensions. These indicators are all part of a comprehensive evaluation which helps us be more accountable to our donors and to the community.

**TSP:** It must feel great to know you caused an improvement in education that helps thousands of kids.

**Owen:** Well, let's be careful about claiming causation. Experience teaches us that the causes of social change are too many to count. We may have played a larger or smaller role in a positive outcome than we can actually prove. I guess grantmaking teaches us all to be a bit modest about our accomplishments. Taking a strategic approach has been a stretching experience for all of us. It's been humbling at times but always instructive.

**TSP:** It sounds like strategic philanthropy is a very deliberate process without many short-cuts.

**Owen:** That's right, we study issues carefully, engage community members, and only then apply our resources. We must have a lot of patience and a forgiving spirit. The foundation is not, after all, just an apparatus. In the end, we often succeed, sometimes fail, but always learn.

**TSP:** Our profound thanks to The Rhode Island Foundation and Owen Heleen and Denise Jenkins for their willingness to share so much time with our readers.

You can reach Owen or Denise at:

The Rhode Island Foundation  
One Union Station  
Providence, RI 02903  
Tel: (401) 274-4564