



SOLICITING EXTERNAL FEEDBACK: DORIS DUKE CHARITABLE FOUNDATION'S WISE PERSON'S REVIEW

Although most CEOs and program officers we interviewed believe that strategy is important in achieving impact, some also expressed reservations. They worry that strategy might make a foundation less receptive to outside perspectives that could call its approach into question — even suggesting that foundation strategy leads to arrogance and isolation from feedback.

Our findings, however, indicate just the opposite. More so than other categories of decision makers, strategic respondents, like those from the Doris Duke Charitable Foundation (DDCF), frequently seek advice from stakeholders — grantees, experts, and others.

Through its “Wise Person’s Review” process, DDCF regularly solicits the opinions of leading experts in each of its program fields and invites comments and criticisms on each of the Foundation’s program strategies — as well as new ideas. Staff members prepare packets to help orient the group’s discussions, which are held over two days. The experts discuss DDCF’s current and proposed grant strategies, using five questions to target their deliberations:

1. Is DDCF addressing critical opportunities and needs in the field?
2. Has DDCF devised appropriate strategies for meeting these opportunities/needs?
3. Has DDCF effectively implemented its strategies?
4. What should DDCF consider doing differently in the future?
5. What has been the role/contribution of DDCF as a funder in the field? How is the Foundation (or its grants) perceived?

The resulting feedback helps staff sharpen their program strategies. For DDCF’s Environment Program, the Wise Person’s Review helped hone the program’s strategy to accelerate the conservation of essential wildlife habitats in the United States, according to Andrew Bowman, who was interviewed when he was program officer of the Environment Program and who was recently named director of the Foundation’s Climate Change Initiative. Rather than continue providing grants for land acquisition, the experts recommended that the program take a more targeted approach. The recommendations “led to developing a focus on state wildlife results — plans that all 50 states have completed to identify where they need to focus their habitat-conservation efforts. [We] then built a strategy around those state wildlife action plans and other activities that would complement them,” Bowman recalled.

The Wise Person’s Review process is an effort to “create the functional equivalent of the marketplace,” says CEO Joan Spero. “You don’t have competition in the foundation world, so how do you get honest criticism? We’ve tried to design that in.”

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