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**“Evaluation in Philanthropy: Adding Good Minds to Warm Hearts”**

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It is a deep honour to be invited to be here in your beautiful country and to participate in your conference at this most exciting time in the history of philanthropy in New Zealand. You are distinctive internationally in the strength and the rapid development of community based trusts and while this presents great challenges, it also presents extraordinary opportunities.

The question I want to explore today is how we might create forms of philanthropy which are a synthesis of the warm heart and the good mind, for philanthropy that is only of the heart can be a waste of money and do more harm than good, while that which is only of the mind can result in cold charity and a preoccupation with measurement. We say in philanthropy that we want to make a difference but how do we know if we are? Do we really want to know if what we are doing is effective, or is there a cosy collusion between grantmaker and grant recipient to avoid asking the hard questions? It is easy to get away with smug self-satisfaction in the world of philanthropy as there are few mechanisms of accountability for the quality of our grantmaking - unlike government services which are increasingly subject to performance audits or in the business sector where market forces apply.

Sometimes we are inclined to assume that because the intentions of grantmakers and grant recipients are good, the outcomes must be good. This is not true. We need look no further than some of the programs philanthropic foundations have supported in areas such as youth suicide and drug abuse prevention to see money put into initiatives for which there was strong pre-existing evidence of harmful outcomes. A short telephone based consultation with one of the clearing houses in these fields would have shown this up and prevented the loss of more lives. Sadly, we have a long way to go in knowledge-based philanthropy in Australasia.

I believe that there is a strong moral obligation on philanthropic foundations to know, as far as is reasonably possible, whether they inflicting harm. One can go further and argue that there is also a moral obligation to know whether the way money distributed

by philanthropic trusts is at least as effective as the way it is spent by government given that the generous tax benefits enjoyed by philanthropic foundations constitute foregone common wealth.

Assessing grantmaker and grant recipient performance can be complex and comes with some costs but this needs to be balanced against the cost of not doing so, and against the lost opportunity cost – what else could have been achieved with the same resources?

Pifer (1984), one of the first to write on evaluating the effectiveness of grantmakers, proposed the following broad questions:

- Does the foundation make grants that simply relieve other funders of responsibility?
- Does it aid causes/institutions that benefit only a small/elite group with no need of help?
- Does it make grants for projects so poorly designed as to have no chance of success?
- Does it actively seek out opportunities to spend funds in imaginative and constructive ways?

These are the broader questions within which a discussion of philanthropy and evaluation needs to be based. Some of these questions can only be addressed by analysing the changing roles of the State, the market and civil society in areas such as health and education.

Others are value questions and require judgement and reflection with the passage of time.

Assessing effectiveness in philanthropy is therefore not simply an accounting exercise.

We must add meaning to measurement.

## **Evaluation in “Strategic Philanthropy”**

In relation to what some call “strategic philanthropy” (a form of intelligent philanthropy which long preceded the term), evaluation is crucial. It is also usually complex. This is not always so however. For example, one grant I was involved in at The Ian Potter Foundation was relatively easy to assess in terms of short term outcomes. A grant was made to a peak body of child welfare NGOs to undertake a study of the real costs of fostering a child in Australia. This study produced findings that were very well publicized and which were immediately and very effectively used across different Australian states to lobby for an increase in foster child allowances payable to foster families. Of course one could not say categorically that the study led to the changes in funding, but most informed observers would judge it to have been a major contributing factor. Is this enough though? Did increasing allowances lead to improved recruitment and retention of foster families which was the longer term and more important objective? This is a more complex but a more important question.

In an approach to grantmaking I have described as a process of “innovate, evaluate and disseminate” (with the possibility of proceeding to “replicate” in cases of successful models), evaluation is always complex.

This approach to philanthropy is based on the premise that if innovative initiatives can be supported and their success determined, the model may be disseminated to others and possibly replicated on a wider scale. Thus by directly helping the few, a philanthropic foundation may indirectly help the many. Given the magnitude of unmet needs across a broad range of fields such as the environment, health, education and social welfare, and the limited resources available to meet such needs, this style of grantmaking seems an appropriate and equitable approach for philanthropic foundations to consider adopting, at least in one priority area of their grantmaking.

However, one would not want to overestimate the potential supply of “innovation”. Nor would one want to force grantseekers into playing an endless game of pretending that the things they have been doing for a long time are “innovative” in order to secure the resources to keep doing them! There are many examples of this as foundations seek to rationalise their short term funding policies in terms of only supporting “innovation”. Perhaps it is more honest to say “we don’t have enough

money to do everything asked of us and so we cannot provide recurrent funding for all the things we would like to support.”

In cases of genuine innovation though, this approach to grantmaking is probably the most visionary and far-reaching form of philanthropy possible. I will use the Potter Farmland Plan to illustrate such an approach and to highlight the place of evaluation within it. The Ian Potter Foundation pioneered the role of philanthropy in the environment in Australia in the mid 1980s, at a time when awareness of the environmentally, economically and socially devastating problem of soil salinity was still fairly low. The Potter Farmland Plan demonstrated methods of land management which were both economically and environmentally sustainable and involved working very closely with a group of landholders to implement strategies which tackled problems such as salinity, erosion and diminishing biodiversity. This initiative helped give rise to the very successful volunteer-based Landcare movement across Australia, and to raise public and political awareness of the magnitude of these problems.

Evaluation occurred at two levels: the efficacy of the land management methods per se; and the degree to which such methods were taken up by landholders. That is, it not only assessed whether the model was successful but it also tracked the diffusion of innovation. Rarely do we do the latter in philanthropy yet there is a large body of research on innovation diffusion and knowledge transfer which could be very helpful to us in assessing the wider impact of our grantmaking. If we were to pay more attention to understanding the conditions under which diffusion of innovation occurs, this could guide our future grantmaking, enabling us to predict with greater certainty which initiatives have a greater chance of success, and the strategies we might need to build into the process to maximize innovation diffusion.

To practise this form of philanthropy, trusts and foundations obviously have to draw upon people with a high level of knowledge and skill. It does not have to be expensive. Very focused expert consultation can be obtained at little cost relative to that being given away. Partnerships with universities also have enormous potential for mutual benefit. Such collaboration is very evident in North American philanthropy but remains undeveloped in Australasian philanthropy.

It may cost no more than a phone call. In my experience, the top people in a field are often very happy to provide advice on an honorary basis to a philanthropic foundation if they are asked to do so. The more expert they are, the more likely they have nothing to lose in giving honest advice, including telling foundations they could have spent their money better than they have, which is something no-one else will have the courage to tell us! The question is – do we really want to know whether we are having an impact or are we just pretending that we want to know? “Feel good philanthropy” may come easier than “think well philanthropy”. It is possible to have both!

Practising an “innovate, evaluate, disseminate and possibly replicate” approach to philanthropy, raises six key questions in relation to specific initiatives:

1. Is it effective (outcome evaluation)?
2. How is it effective (process evaluation)?
3. Is it cost-effective and sustainable?
4. Is it transferable across different contexts?
5. How might it be embedded in systemic reform?
6. What is the long term impact?

### **1. Is it effective?**

Assessing effectiveness is about measuring outcomes. This is far more than measuring outputs such as numbers served. This can be useful data but is better understood as monitoring rather than evaluation. (For a discussion of the distinction and some helpful monitoring and evaluation tools, see the 1988 publication of the UK based Association of Charitable Foundations written by Des Palmer). Outcome or Summative Evaluation is focused on measuring, usually in quantitative terms, the effect of an intervention in relation to specific objectives. In most instances “the gold standard” of research, an experimental method such as a randomized controlled trial, is not feasible. In areas such as community development for example, there are too many influences at work, and in fields such as child protection, it may be unethical to withhold a service from one group.

The best we can usually have is “real life” evaluation which is “quasi-experimental”, such as a “natural experiment” where we compare similar areas using population wide measures. For example, indigenous infant mortality rates or

school readiness scores can be used to assess the impact of an intervention introduced into some areas and not others. Or we can do “before and after” measurements. For example, using the same measures prior to and after the intervention. While it is difficult to be completely confident that any improvement is the result of the intervention, given other factors that may be involved, if done rigorously and with proper statistical analysis, this can be a very robust form of evaluation.

Sometimes the outcome measures may look as if the intervention has failed when this may not be the case at all. An evaluation may be premature – before a new program has really had a chance to establish itself and iron out its teething problems, or the change brought about may only be evident further down the track. This was true of the early evaluation of the US Head Start program, a major early childhood education initiative of the 1960s which, among many other things, pioneered the very creative use of television such as Sesame Street to reach into the homes of deprived African-American children not receiving pre-school education. It was only in the longer term evaluation, a number of years later, that the lasting educational and social benefits of Headstart were demonstrated.

Sometimes “negative outcomes” do not mean that an initiative is a failure. For example, some of the evaluations of home visiting programs (where vulnerable families with infants receive regular visits from a volunteer or professional person in their home), have shown a higher rate of child abuse in the group receiving the service. Does this mean that home visiting causes child abuse? It is more likely that such programs allow abuse that would otherwise remain undetected to be identified.

Sometimes what were initially thought to be indicators of failure may turn out to be the very opposite. In the evaluation of the Potter Foundation funded community rebuilding initiative Shared Action, developed by St Lukes’ Anglicare in Long Gully (near the Victorian regional city Bendigo), some of the results were paradoxical. For example, it was thought that declining reports of vandalism would be a good measure of success yet with stronger relationships developing between previously isolated residents and the rise in morale and collective

confidence in the community, people began to take more responsibility and to contact the police about vandalism and violence which they had previously ignored because they were too afraid to get involved or believed nothing would change as a result. Thus the formal reports of these problems actually increased while vandalism was visibly less obvious to the local observer. It was therefore important in Shared Action to use a broad range of ways of assessing social cohesion and community spirit, not just “before and after statistics” on vandalism. For example, the absence of vandalism in the children’s playground that was designed and built by the local community in the Shared Action project was there for all to see. Because people, including children and young people, felt a sense of collective ownership in the playground, it was not destroyed.

This reminds me of my visit to Christchurch in Spring some years back when I was in awe at the beauty of the huge number of daffodils in bloom and struck by how people didn’t go and pick them. The answer, I discovered, was that over some years, Christchurch residents had donated a million daffodil bulbs and helped in their planting. Not only was there a collective sense of ownership as a result but social norms emerged that restrained those who might otherwise be tempted to pick them. This is a lovely example of social capital – of trust and reciprocity in a community. We therefore need to supplement the measuring of outcomes with more subtle methods, especially when we are dealing with less tangible phenomena such as social cohesion and social capital. The blossoming of the daffodils is a lovely visual symbol of observational methods of evaluation.

## **2. How is it effective?**

Formative or process evaluations focus on *how* the program worked, in contrast to summative or outcome evaluations which focus on *whether* it worked. They are usually more qualitative in nature and provide a “thick description” of how the project was implemented and the incremental impact that seemed to occur.

Again, it is not possible to be definitive about the ingredients for success or failure in a particular program as rarely can such factors be systematically manipulated in a

scientific way. This does not mean that the research is weak but that the nature of the terrain is too complex for a simple “scientific” approach alone.

In the words of Donald Schon, the author of the book *The Reflective Practitioner*:

“In the varied topography of professional practice, there is a high, hard ground where practitioners can make effective use of research based theory and technique, and there is a swampy lowland where situations are confusing ‘messes’ incapable of technical solution. The difficulty is that the problems of the high ground, however great their technical interest, are often relatively unimportant to clients in the larger society, while in the swamp are the problems of greatest human concern.” (Schon, 1983, pp42-43).

If philanthropy is to get involved in the “problems of greatest human concern”, which I would argue is its *raison d’être*, then it must grapple with being in the swamp, and that is not such a bad place to be – after all, the swamp is a very fertile place and it is where all life began. Sometimes we need to get right into the swamp and get muddy. Direct involvement in some capacity can give a “participant observer” dimension to evaluation. This can be invaluable but the grantmaker-grant recipient relationship can get very complex when we become participants. There is also the risk of the grantmaker “going native” and becoming an enthusiastic convert who loses their sense of judgement and resists rigorous evaluation.

Often it is the people more than the program which is critical to success. In a pilot program it is common to have people who are inspired and highly motivated and it may be that it is not the program model per se but the calibre of key individuals that is the more crucial ingredient. This is hard to assess but very important as it is likely that philanthropic foundations support some of the most committed people in the community. If we want a model that has the potential to be effective under “normal circumstances”, then we either need to find ways of “cloning” exceptional people (for example, creating training programs that allow others to acquire their qualities and skills) or assessing whether it can work when it is carried out by less exceptional people. Outcome and process evaluations of replication attempts are also necessary.

### **3. Is it cost-effective and sustainable?**

Sustainability is one of the biggest challenges in philanthropy. Unless an initiative is very cost effective it is unlikely to survive, even in its pilot site. This is hard to assess. It might well be that for every dollar spent on early childhood education seven dollars are saved downstream, but whose dollars and in what time frame, is what matters. Demonstrating outcomes from an early childhood education intervention which may reduce crime two decades on is unlikely to provide an incentive to those responsible for juggling the tight budget in the early childhood area, especially when to introduce such an intervention may entail cutting back other services for children.

Cost savings downstream and in other domains are only likely to become incentives for sustaining a program if it is done as part of a “whole of government” initiative. We are beginning to see some interesting “inter-sectoral” models of this across the world, most notably in the UK where the Sure Start initiative is transforming the way disadvantaged communities meet the needs of children and families. What is so distinctive about Sure Start is that the funding body, government, does not say how the money is to be spent, just what the outcomes need to be. Thus different communities can decide what is best for them to do in order to increase the proportion of children who are ready for school. This allows flexibility in relation to local conditions but equally importantly, gives control back to the community for its destiny, while still holding those receiving grants accountable for the outcomes. It also enables the relative success of the approaches adopted in different areas to be determined by using the same outcome measures.

We cannot assume that governments will “pick up” the recurrent funding of the projects philanthropy has helped create. If this is the sustainability strategy then it is vital to engage government from the outset and at an appropriately high level, to see if what is being proposed fits with their policies and priorities. Sometimes an issue may not yet be on the government agenda, but it is still useful to have a dialogue about this as agendas can change quickly in a political environment and philanthropic foundations can even help change the agenda. The Myer Foundation’s recent initiative in the area of aging policy in Australia is a good example of an attempt to do this.

If government funding is not a viable sustainability strategy, then a sound business plan is needed. There may be other sources of income and in some instances, such as

employment creation initiatives, it may even be possible to become self-funding, especially if there is a niche market.

A major risk is that philanthropy, like government, can develop an insatiable appetite for launching new initiatives, giving rise to a plethora of pilots with little thought to how they will be sustained if they are worthwhile, or what else will have to go to achieve this. We can deeply demoralize organizations and the disadvantaged communities they serve by starting new initiatives and then abandoning them as this can diminish the social capital of a community, leaving it with less hope than it had in the first place. The first principle in philanthropy should always be to “do no further harm”.

#### **4. Is it transferable across different contexts?**

A good process evaluation should provide sufficient detail about the broader context of the program and the environment in which it was originally implemented to be able to identify the conditions under which it worked. The evaluator also needs to give some thought to the contexts in which it might be transferable with or without adaptation (for example, urban-rural, demographic, cultural, policy and service system).

If I may use an agricultural metaphor in relation to “technology transfer” or what I prefer to call “transplanting innovation”, it is akin to trying to grow a plant in a new site. One needs to know not only about the plant, how high it might grow etc, but enough about the soil conditions and micro climate in which it flourishes naturally to know whether it is likely to take root in a different place and what fertilizer or additional water might be necessary for this to happen.

In “scaling up” an initiative, one is not only interested in dissemination and replication but also in possible adaptation. That is, a successful program is rarely a “one size fits all” panacea but an equation based on the goodness of fit between the model’s characteristics and a particular context. Understanding its essential ingredients and its contextual conditions sufficiently well so that one might predict how it needs to be adapted to other conditions is challenging, for often those closest to it cannot see the wood for the trees - they don’t recognize what makes up the context

as it is just “normal” to them. Care needs to be taken by those interested in transplanting the model not to throw the baby out with the bathwater, while being mindful of what might need to be changed to fit local conditions. This balancing act needs to be done as systematically as possible, and with full documentation so all can learn from the experience.

In Shared Action, the success in Long Gully quickly gained the interest of a new State Government and with the creation of the Department of Victorian Communities and the adoption of a strong community building policy framework, it has become an exemplar which other communities are encouraged to replicate. This has proved to be challenging as often those embarking on community building initiatives are inclined to want to copy the product rather than the process. The tangible things done under the Shared Action initiative such as an oral history project to tap the pride in the community’s rich history, a volunteer program to welcome new people coming into the neighbourhood, an under 12 football team, construction of a new children’s playground etc, only happened as a result of a long and patient process of engagement with the community by highly skilled and deeply committed social workers and community development workers.

These projects were not suggested or imposed and a replication of these projects in other communities does not constitute the Shared Action model. It is the process of community engagement and development that is the Shared Action model. This has not been easy for people to understand as processes are always more nebulous than products. By providing philanthropic support to St Lukes to disseminate Shared Action in a number of forms (for example, a video, a book, a “community friendly” evaluation and a formal evaluation report), it has been possible to increase the potential for others to learn from their experience. Without additional philanthropic financial support for this purpose, it is unrealistic to expect NGOs to undertake the dissemination of their innovative initiatives, as their organizational mandate and resources may restrict this. Some foundations take on the dissemination role themselves. For example the Bernard Van Leer Foundation in the Netherlands invests heavily in the dissemination of the early childhood development initiatives it supports throughout the world (see [www.bernardvanleer.org](http://www.bernardvanleer.org)). This foundation’s Effectiveness Initiative is among the best one could find in philanthropy.

## **5. How might successful models be embedded in systemic reform?**

In Lisbeth Schorr's excellent book *Common Purpose: Strengthening Families and Neighborhoods to Rebuild America*, she asks why so many positively evaluated programs funded by philanthropic foundations have never been replicated. "Why do models of excellent schools, effective job training, and wonderful early childhood programs remain only models? Why do interventions that actually change the odds for their high-risk participants succeed briefly ... and fail the moment we try to sustain them ... or expand them?"

On the basis of 200 or so interviews with managers, researchers, funders and practitioners as well as site visits to over 40 successful programs, she concludes that it is the failure to bring about the reform within the institutions and systems within which programs must operate and on which they depend for resources and legitimation, that has been the great failure in US philanthropy.

"The history of efforts to replicate, sustain, and scale up from effective programs is dismal. The single most important reason ... is the failure to understand that the environment within which these program have to operate, and which these programs depend on for long-term funding, skilled professionals, and public support, is profoundly out of sync with the key attributes of success. Scaling up effective services requires conditions that are exceedingly rare.

That is why effective programs have flourished only under some form of protective bubble, outside or at the margins of large public systems. Protective bubbles can be created by foundation funding, by a powerful political figure, by a leader who is a wizard, by promises that that the effort will be limited in scale and time, or by a combination of these. The problems arise when the successful pilot program is to expand and thereby threatens the basic political and bureaucratic arrangements that have held sway over the decades."

We can learn from these failures. One of the lessons is the vital importance of philanthropic partnerships with government and business. This is not easy as

philanthropy is often ambivalent toward government, and foundations have not generally been good at collaboration, but we cannot work in isolation and expect to have a major impact on “the problems of greatest human concern”.

I have been involved in, or closely observed, a number of initiatives where people have tried to transplant overseas models in Australia and embed them in government policy and practice. Sometimes this has worked well (for example, the introduction of North American intensive family preservation services to prevent the removal of “at risk” children, or the transfer of the New Zealand “family group conferencing” approach to child welfare services in Australia). The essential ingredient in both of these was the level of government support.

In the case of intensive family preservation services, it “went to scale” before the results of the evaluation were available because the government was approaching the end of its term and a deeply committed Minister saw that there was an imperative to act or miss the opportunity entirely. This was fine in the short term but a decade down the track, the lack of a strong evidence base on the effectiveness of a relatively expensive model of service delivery, has contributed to it being “watered down” in a number of its key program components, putting its value at risk.

In another example, the North American Families and Schools Together (FAST) program, which brings vulnerable families together in a primary school in very creative and therapeutic ways, has not been taken up as widely as was hoped because it has a high cost per family, and because it falls between the “silos” of education and social welfare. The devolution of budgets to the school level leaves school councils and principals with the unenviable decision of supporting an expensive program for a small number of high need children and families at the expense of a part-time librarian, music teacher or art program for all of the school’s children. However, the FAST pilot programs across Victoria did help many schools see that there were different ways of working with troubled families and this might prove to be its greatest benefit. That is, the transfer of the specific program may have failed but the thinking behind the model may be a more important legacy. If this way of working can be integrated into the core roles of people such as school counselors and school nurses, then it may ultimately achieve its objective, even though the specific program

is not taken up. There is increasing awareness that innovation in the fields of health, education and social welfare will not “go to scale” unless these new ways of working are incorporated within the core universal services. This again is an argument for close partnerships between philanthropy and government.

## **6. What is the long term impact?**

It is only with the passage of time – a decade or more perhaps, that one can start to evaluate the real impact of some initiatives. An “impact on the wider field evaluation” or what the Pew Charitable Trust calls “cluster reviews” are very valuable but rarely done in Australasian philanthropy. This raises not only the issue of how to assess impact over the longer term, as there are obviously a host of intervening factors, but the issue of how to encourage philanthropic foundations to maintain their commitment to certain priorities long enough to be interested in even asking the question. In New Zealand where many of the community trusts have elected or government appointed trustees for periods as short as three years, this may prove to be a major challenge in relation to the potential to adopt a longterm strategy.

A nice illustration of a cluster review was The Ian Potter Foundation’s evaluation of what had been achieved in a decade of supporting no-interest loans (NILS) in Victoria. Over this period grants had been made to a large number of community-based social welfare organizations to enable them to make small loans to very low income families who did not have normal access to credit. The loans are usually used to purchase items such as white goods. With few exceptions, the repayment of these loans has been excellent, with no use of coercive debt collection methods being one of the principles of the program. In most instances the borrower chooses to repay the loan through small, direct deductions from their social security benefits (this was only achieved by co-operation from government – another example of good collaboration). Like any other direct debit arrangement, this is reversible by the individual at any time but this is rarely done by borrowers as the whole scheme is based on, and generates, trust and reciprocity.

From the individual reports from separate programs over the years, the Potter Foundation was confident that it had worked well but before expanding the NILS grants to other States we wanted to know how well it had worked and whether one

might extract from the large number of grants made the program and organisational characteristics which had proved to be most successful. That is, one can refine a “best practice model” from the aggregate data which exists within a philanthropic foundation – the potential to do this is enormous as philanthropic foundations start to use more sophisticated data bases. As part of the interstate “roll out” of NILS, The Potter Foundation also made a grant to the organization in Melbourne, Good Shepherd Family Services, which had developed the original program and software so that they could continue to provide a high level of technical assistance and support to organizations wishing to set up the same service.

## **Conclusion**

I have argued that rigorous evaluation is a necessary but not a sufficient condition of good grantmaking. Well evaluated programs will ultimately amount to little unless they are sustainable and underpinned by a broader and longer term reform agenda undertaken in collaboration with government.

Unless philanthropic foundations build the intellectual capital to match their financial capital and the social capital of the organizations they support, we will fail to have a significant and lasting impact. Not to do so is to squander precious resources and opportunities. Again I pose my question – “do we have the courage to find out if we are really making a difference?”. For the sake of our communities and the major problems they face, from looming environmental disasters to increasingly fragile families and demoralized communities, we have to find the courage to answer this question in the affirmative.

To courage we must add hope and inspiration, perhaps the most valuable qualities of all in an era when the spirit of the age is one of fear and despair. For me, children have always been the most powerful source of inspiration. Each child born is a harbinger of hope for the world. I would therefore like to end by sharing with you a true story of the courage and inspiration of a boy whose words speak to us about the major challenge facing philanthropy today that I have explored with you – the need to use our mind as well as our heart, and to work collaboratively with others.

Earlier this year off the coast of Queensland, a Torres Strait Islander family experienced a tragedy when their dinghy capsized. The mother and father, along with an infant, drowned. The 12 year old boy and his two younger sisters swam to a rocky outcrop. There they stayed for some days, but with no food or water, they too faced death. The boy had the courage to make the decision that they had to swim the several kilometers of perilous sea to reach an island. This they did and were rescued by an uncle. The boy encouraged his sisters to do this with words which translate into English as “we will swim with one heart and one mind”. There is wisdom in the words of this boy for those of us in philanthropy who really want to make a difference in the problems of greatest human concern.

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