

FAKTAARK

Nasjonale og internasjonale stiftelser og foundations

Mai 2014



Oversikt utarbeidet på oppdrag fra Gjensidige Stiftelsen



NORWEGIAN
BUSINESS SCHOOL

FAKTAARK - Nasjonale og internasjonale stiftelser og foundations

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Nasjonale og internasjonale stiftelser og foundations

Mai 2014

- Bill & Melinda Gates Foundation
- California Endowment
- Extra Stiftelsen
- Ford Foundation
- Robert Wood Johnson Foundation
- Robin Hood Foundation
- Rockefeller Foundation
- Sparebankstiftelsen DnB
- TrygFonden

Utarbeidet av Caroline D Ditlev-Simonsen
på oppdrag fra GjensidigeStiftelsen

Bill and Melinda Gates Foundation

<http://www.gatesfoundation.org/>

Country	Capital – size of the foundation	Donations in 2012
USA	\$ 37 milliarder (ca 222 milliarder NOK)	23 milliarder NOK

1. THE FOUNDATION

Background

In 1997 “Bill and Melinda Gates read an article [] about millions of children in poor countries who die from diseases eliminated long ago in the U.S.” This was the start of their foundation starting off with polo vaccine to kids in India. Other highlights are: The establishment of the Scholars Program increasing the number of minority students graduating with advanced degrees (1999), approaching the UN Millennium Development Goals (eradicating extreme poverty, reducing child death, and fighting disease) (2000), opening a regional office in Washington D.C (2001), launch HIV/AIDS Prevention Branch in India (2003), restructuring the foundations three priorities to Global health, global development, and work in the U.S (2006), Warren Buffet Pledges over \$30 billion the Foundation, together with the Rockefeller Foundations, launch Alliance for a Green Revolution in Africa lead by Kofi Annan (2006), Bill starts to work full-time in the Foundations (2008), launch a program across the U.S supporting bold, ambitious plans to transform the way schools recruit, develop, reward, and keep teachers (2009), open London office, join The Giving Pledge, an effort to encourage America’s wealthiest families to donate the majority of their wealth to good causes (2010) and host the Family planning summit to support and help women in the field of contraceptives.

Purpose – vision and values

“Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people’s health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington, the foundation is led by CEO Jeff Raikes and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett.”

Key areas

According to the Foundation Fact Sheet the Foundation has four grantmaking areas.

- **Global Development Program;** “Nearly 2.5 billion people worldwide live on less than US\$ a day, and more than 1 billion suffer from chronic hunger. For these people, the basics of food, water, shelter, and sanitation are in short supply, and healthcare and education can be unaffordable luxuries. Our Global Development Division aims to identify and fund high-impact solutions that can help hundreds of millions of people lift themselves out of poverty and build better lives. We work closely with our partners to support innovative approaches and expand existing ones so they reach the people who are most in need.”
- **Global Health Program;** “Our Global Health Division aims to harness advances in science and technology to save lives in developing countries. We work with partners to deliver proven tools – including vaccines, drugs, and diagnostics – as well as discover pathbreaking new solutions that are affordable and reliable. Equally important is innovation in how we bring health interventions to those who need them most. We invest heavily in vaccines to prevent infectious diseases – including HIV, polio, and malaria – and support the development of integrated health solutions for family planning, nutrition, and maternal and child health.”
- **United States Program;** “In the United States, our primary focus is on ensuring that all students graduate from high school prepared for college and have an opportunity to earn a postsecondary degree with labor-market value. Our approach is to play a catalytic role – to support the development of innovative solutions in education that are unlikely to be generated by institutions working alone and that can trigger change on a broader scale. We also work to address issues of social inequity and poverty in Washington State, where the Gates family has lived for generations and the foundation makes its permanent home.”
- **Global policy & advocacy;** “Because our resources alone are not enough to advance the causes we care about, we engage in advocacy efforts to promote public policies that advance our work, build strategic alliances with governments and the public and private sectors, and foster greater public awareness of urgent global issues.”

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded

The following are programs that are funded in the different areas.

- **Global Development Program;** Agricultural Development, Emergency Response, Family Planning, Financial Services for the Poor, Global Libraries, Maternal, Neonatal & Child Health, Nutrition, Polio, Vaccine Delivery, Water, Sanitation & Hygiene.
- **Global Health Program** Discovery & Translational Sciences, Enteric and Diarrheal Diseases, HIV, Malaria, Neglected Infectious Diseases, Pneumonia, Tuberculosis.
- **United States Program;** College-Ready Education, Postsecondary Success and Washington State.
- **Global policy & advocacy;** Tobacco Control.

Who decides what to support

The process below is established to making a grant. It is the program officer who reviews the submitted materials. After a due diligence analysis, the final decision is taken by a foundation executive. The higher the dollar value of the project, the greater number and level of reviews.

The process of making a grant is based on the following four phases:

Stage 1: Concept Development “Program staff identify ideas and concepts in support of our strategic priorities. We shape these through conversation with foundation colleagues, practitioners, researchers, policymakers, and other resources in the field. When an idea or concept is sufficiently formed, a program officer begins outreach to potential applicants.”

Stage 2: Pre-Proposal A variety of means is used to explore and refine a concept, for example Direct solicitation (ask organizations to submit proposals), Discussion and dialog (invite organizations to discuss the issues), Concept Memo (when several organizations are interested in following up the issue, ask them to submit a memo on their view of the), Request for proposal (open invitation to submit proposal – from both private and public entities).

Stage 3: Investment Development Guidelines and format for applications are developed and the Foundation cooperate with potential partners. Then the applications are evaluated by the Foundation. The larger the project, the more encompassing the evaluation process. It is the Foundation executive who decided who is awarded the contract.

Stage 4: Management and Close Program officer has prepared a plan for the implementation of the

organization that has received funding. This is followed up and organization reports back on progress.

Requirements for projects to be supported

What the foundations supports is based on the foundations’ strategy. This strategy is continuously reviewed and changed. “The strategy lifecycle is a framework that guides our work. We develop strategy, allocate resources, make grants, capture and share data on progress, reflect on lessons learned, and course-correct, as necessary. Essential to this process is ongoing dialogue with our grantees and partners, early in the planning process and throughout the strategy lifecycle.”

What is not supported

“The foundation is unable to make grants directly to individuals. The majority of our funding is proactive and made to U.S tax-exempt organizations that are independently identified by our staff.”

The following are some examples of areas that are not funded:

- “Direct donations or grants to individuals
- Projects addressing health problems in developed countries
- Political campaigns and legislative lobbying efforts
- Building or capital campaigns
- Projects that exclusively serve religious purposes”

How the support is reported

“At the end of the project, the funded organization will typically submit a final report, summarizing the results achieved and lessons learned.”

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

“The Results Framework & Tracker is a new tool that will help the prospective grantee or vendor identify how they will measure results (i.e. outcomes and outputs) and report on progress against them over the course of the investment. This tool will be used during the design and management phases of the investment.” (information from 2012 – only one hit when searched on Framework & Tracker)

“We purposefully do not measure every result of a strategy, a portfolio of investments, or an individual investment. Instead, program officers and partners identify the most critical metrics of progress that support continued learning, adjustment, and alignment.

We are more interested in working with partners to define and measure results rather inputs and activities. Although we know this is difficult to do well, the foundation is eager to support this type of focused and selective measurement. We recognize that improving this practice is a journey that will not happen overnight.”

“We also acknowledge the vigorous debate about evaluation methods that is occurring across many fields in which we work. As our evaluation policy details, we value a purpose-driven approach that avoids one-size-fits-all prescription. This is the starting point of our larger effort to make selective, high-quality evaluation an integral part of how we operate and carry out our work.”

“In order to learn and adjust along the way, we use scorecards and relevant data to track progress against our strategic outcomes. We also use evaluation to understand how we can support our partners’ execution and create actionable evidence about what works best to achieve programmatic outcomes.”

The Guide to Actionable Measurement put forward three basic principles:

1. “Measurement should be designed with a purpose in mind — to inform decisions and/or actions;
2. We do not measure everything but strive to measure what matters most;
3. Because the foundation’s work is organized by strategies, the data we gather help us learn and adapt our initiatives and approaches”

The annual report for 2012 is of eight pages and very simple and descriptive. It is the annual letters from Melinda and Bill Gates which give an overview over performance and results of the projects supported. In the Annual letter for 2012, goals are clearly put forward and results are accounted for with numbers.

This is a good example addressing the AIDS program:

1. **Reduce the number of people getting infected.** By 2015, the goal is to cut infections to 1 million per year, which would represent a 68 percent drop from the peak a decade ago.
2. **Provide drugs for everyone who needs them,** so those with AIDS can live longer and more productive lives. Last year, 1.8 million people died of AIDS.
3. **Find a cure.** Although there are people working toward a cure, it is viewed as so difficult that we can’t count on ever having one”

Figures illustrating achievements are presented in both the Annual letter for 2012 and 2013. In the letter for 2014 however, the topic is “3 myths that block the progress for the poor” and hardly any concrete goals and effect evaluation is addressed.

4. EVALUATION

Tre ting som vi kan lære av – ta med videre, og tre ting som ikke er så bra

Styrke

- ☺ Har klare mål
- ☺ Har en ansatt ansvarlig for måling (director of Strategy, Measurement, and Evaluation)
- ☺ Utpeker noen spesifikke områder å måle
- ☺ Ber de som mottar støtte å evaluere stiftelsens ansatte og hvordan stiftelsen opererer.

Svakheter

- ☹ Dårlig rapportering om effektmåling (virker som mindre åpenhet her). Stiftelsen arbeider mye med tema men er mindre åpne med publisere resultatene.
- ☹ Lite åpenhet om kritikk, ikke alle er like enige om fremgangsmåten til denne stiftelsen.
- ☹ Lite demokratiske prosesser, med en leder som har såpass kontroll på hele stiftelsen blir det raskt subjektive avgjørelser.

INVESTERINGS POLICY

Bill and Melinda “have defined areas in which the endowment will not invest such as companies whose profit model is centrally tied to corporate activity that they find egregious. This is why the endowment does not invest in tobacco stocks.” “the investment team to be consistent with the approach taken by the endowment managers for Harvard, Yale, and Stanford universities.”

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.gatesfoundation.org med mindre det er ført opp andre referanser.

The California Endowment

<http://www.calendow.org>

Country	Capital – size of the foundation	Donations in 2011
USA	\$ 3,6 milliarder (22 milliarder NOK)	696 millioner NOK

1. THE FOUNDATION

Background

“The California Endowment was established in 1996 as a result of Blue Cross of California's creation of its for-profit subsidiary, WellPoint Health Networks. Since then, we've invested in health broadly, from strengthening the safety net for families struggling with poverty to diversifying the health care workforce.

The lessons learned from early investments were the genesis for Health Happens Here and the 10-year, \$1 billion Building Healthy Communities plan, in which residents in 14 places are working to transform their neighborhoods.”

Purpose – vision and values

“The California Endowment is a private, statewide health foundation with a mission to expand access to affordable, quality health care for underserved individuals and communities, and to promote fundamental improvements in the health status of all Californians.”

Key areas

“Health Happens Here is the core of our work. It challenges us to think about people's health beyond the doctor's office and beyond the good vs. bad choices people make. In reality, our health happens where we live, learn, work and play—in neighborhoods, schools, and with prevention.”

School

- Healthier School Food & Beverages,
- All Aboard the School Success Express,
- Exercise During the School Day,
- Social-Emotional Health for Students

Action

- Take Action, Campaign Toolkit

Communities:

- Making Health Happen by Building Healthy Communities

Who decides what to support

No specific information about this.

Requirements for projects to be supported

“The California Endowment makes grants to nonprofit organizations, tribal governments and public agencies that directly benefit the health and well-being of Californians.”

“From 2010 to 2020 most of the Endowment's funding is committed to the Building Healthy Communities (BHC) plan. The information on this page is for those organizations who have been invited as part of BHC to submit a grant proposal.”

What is not supported

“We do not seek, nor often fund, unsolicited grant applications. The Foundation's approach to grant making focuses on 14 places across California, where residents are proving that they have the power to make health happen in their neighborhoods, schools and with prevention – and in doing so creating a brighter future for their children and for our state.”

“We only make grants to organizations” not individuals.

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded

Neighborhood:

- Junk Drinks & Junk Food,
- Places to Walk and Play and
- Safe Streets

Prevention

- Encouraging Enrollment Through the Affordable Care Act (ACA),
- Helping Small Businesses Implement the Affordable Care Act,
- Giving Rise to Healthier Communities

How the support is reported

The Foundation has a well functioning Grant Finder program where interested parties can search on topics, titles, budget, location etc. of projects which have been supported.

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.calendow.org med mindre det er ført opp andre referanser.

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

Measuring progress: “The California Endowment is committed to promoting shared learning among our staff, grantees, and partners about how to create healthier communities. We do so through supporting evaluation, research and convenings and through sharing what we learn with our partners and the field. We work to apply data and research in real time to inform strategy and to create greater impact. In addition, we seek feedback on our role as a funder and change-maker in order to become a more effective leader.

We measure progress by assessing the impact of our efforts on health outcomes and by evaluating our contribution to building the strength of communities to create change. We are guided by 4 Big Results: creating health homes for all children, reversing the childhood obesity epidemic, increasing school attendance and reducing youth violence.”

“To measure progress towards the results, The Endowment established 10 outcomes, which are necessary to insure that California’s children and youth are healthy, safe and ready to learn.”

4. EVALUATION

Tre ting som vi kan lære av – ta med videre, og tre ting som ikke er så bra

Styrke

- ☺ Har klare mål
- ☺ Er opptatt av å dele erfaringene
- ☺ God prosjektdatabase

Svakheter

- ☹ Ikke åpenhet rundt resultat av vurderinger

INVESTERINGS POLICY

“Screens tobacco from its investments. Program-related investments and mission-related investments comprise 2–5 percent of its endowment.”
(www.ussif.org)

Extra Stiftelsen

<http://www.extrastiftelsen.no/>

Land	Kapital – stiftelsens størrelse	Utdeling 2013
Norge		220 millioner NOK

1. STIFTELSEN

Bakgrunn - initiativtakere

“ExtraStiftelsen helse og rehabilitering er en stiftelse bestående av 28 landsomfattende helse- og rehabiliteringsorganisasjoner som har konsesjon til å drive TV-spillet Extra. Overskuddet av Extra skal bidra til frivillige organisasjoners innsats for å bedre fysisk og psykisk helse i Norge. Frivillige/humanitære organisasjoner med helse- og rehabiliteringsrelatert virksomhet kan søke om midler til definerte prosjekter innen forebygging, rehabilitering og forskning. Det er åpent for organisasjoner å søke om midler uavhengig av medlemskap i stiftelsen..”

Formål – Visjon og verdier

“Stiftelsens formål er

- å tilrettelegge forholdene for at allmennheten kan delta i spill på fjernsyn over en eller flere fjernsynskanaler, og
- å utdele overskuddet av spilleinntektene til støtte for den frivillige helse og/eller rehabiliteringsrelaterte virksomhet som retter seg mot målgrupper i Norge, herunder det forebyggende helsearbeid som utføres av frivillige humanitære/ideelt samfunnsnyttige organisasjoner og funksjonshemmedes interesseorganisasjoner både når det gjelder den fysiske og den psykiske helse. Støtte kan også gis til slik forskning.

For å tilrettelegge forholdene for at allmennheten kan delta i spill på fjernsyn over en eller flere av de norske fjernsynskanaler, kan stiftelsen inngå avtaler med driftsselskaper, fjernsynsselskaper og andre institusjoner samt enkeltpersoner.

Avtaler vedrørende det tekniske og programmessige opplegg for spill på fjernsyn over norske fjernsynskanaler må ikke være i strid med grunnleggende etiske prinsipper for helse- og/eller rehabiliteringsrelatert virksomhet og forskning.”

Kjerneområder

Extrastiftelsen deler ut 1/3 av midlene til hvert av de følgende tre områdene:

- forebygging
- forskning
- rehabilitering

2. HVA STIFTELSEN STØTTER

Hva slags tiltak støttes

“ExtraStiftelsen fordeler overskuddet fra Extra-spillet til frivillige organisasjoners helseprosjekter.

ExtraStiftelsen har en vid forståelse av helse, noe som innebærer at vi støtter tiltak og prosjekter som fremmer fysisk og psykisk helse, mestring og livskvalitet.

Prosjektene vi støtter spenner fra små, lokale, ildsjelprosjekter, til store nasjonale forskningsprosjekter.”

“Søknadene kan rette seg mot:

- Somatisk helse
- Psykisk helse
- Tiltak for funksjonshemmede, kronisk syke og pårørende
- Tiltak for bedre levekår
- Andre helseområder”

“Det er ingen beløpsgrense. Vi har prosjekter fra 5.000 kroner og opp til 1,5 – 2 millioner kroner.

Gjennomsnittsprosjektet innenfor forebygging og rehabilitering ligger på 270.000 kroner og innen forskning på 580.000 kroner.”

Hvem bestemmer hva som støttes

Slik behandles søknadene “Tre fagutvalg, ett innenfor hvert av de tre virksomhetsområdene forebygging, rehabilitering og forskning, bestående av til sammen 47 personer med høy kompetanse innenfor et bredt spekter av fagområder, foretar den faglige vurderingen av søknadene. Det er alltid minimum to personer som grundig vurderer hver søknad. I tillegg diskuteres alle søknader av fagutvalget i plenum. Søknadene vurderes og prioriteres etter kvalitetskriterier som fremgår av Retningslinjer for fordeling av midlene.”

Krav til prosjekter som støttes

Det er bare godkjente søkerorganisasjoner som kan søke. Fristen for å bli godkjent som søkerorganisasjon er 1. mai. Pr april 2014 var det 242 godkjente organisasjoner.

I søknader: “Følgende forskningsområder vil bli vektlagt: Anvendt forskning, herunder utvikling av nye behandlingsmetoder, forebygging av fysisk og psykisk sykdom, rehabilitering/habilitering av

funksjonshemmede og kronisk syke. Det stilles strenge krav til forskningsdesign. Prosjekter som er forsøks- og utviklingsarbeid eller utrednings- og kartleggingsarbeid skal søkes innenfor forebygging eller rehabilitering. Se nærmere forklaring [her](#).”

Prosjektene skal rette seg mot målgrupper i Norge. Det vil bli lagt vekt på brukermedvirkning og brukerstyring. Barn og eldre er viktige målgrupper. På grunn av få søknader rettet mot eldre ønsker ExtraStiftelsen flere søknader innenfor dette området. Det anses som positivt at frivillige organisasjoner samarbeider om prosjekter og sammen fremmer søknad. Det legges vekt på gode planer for informasjon om prosjektarbeidet og for formidling av prosjekresultater. Det bevilges normalt ikke midler til organisasjoners drift eller etablering av institusjoner. For øvrig vises til Retningslinjer for fordeling av midler, og veiledningen til søknadsskjemaet.”

“Det er ønskelig at større prosjekter evalueres. Det kan søkes om midler til eksterne evaluering i søknaden om prosjektmidler, eller det kan fremmes egen søknad. Opplegg for evaluering må beskrives og begrunnes.”

“Det er søknadsfrist en gang i året: 15. juni kl 15.00. Dette er fristen inn til ExtraStiftelsen, men organisasjonene har egne, interne frister. (Se lenger nede på siden, under "Søkerorganisasjonens ansvar") Offentliggjøringen skjer ved Extratildelingen i november.”

Hva som ikke støttes

“Hva som faller utenfor kriteriene til ExtraStiftelsen” dreier seg hovedsakelig om forskningsprosjekter og er knyttet til forhold rundt stipendiat og postdok stillinger.

“Det gis i hovedregelen ikke midler til etablering av institusjoner i regi av frivillige organisasjoner. Det kan gis støtte til forprosjekter og utredninger av etablering av institusjoner.

Det gis i hovedregelen ikke midler til etablering av nye organisasjoner.

Det gis i hovedregelen ikke midler til dekning av ordinære driftsutgifter.

Bevilgning til utstyr forutsetter at utstyret er nødvendig for gjennomføring av prosjektet, at utstyr ikke kan skaffes på annen måte, og at det foreligger en plan for bruk av utstyret etter endt prosjektperiode.”

Hvordan det rapporteres om støtten

“Det skal skrives en sluttrapport når prosjektet er avsluttet. Fristen for innsending av regnskap er 15. mars, og fristen for innsending av sluttrapport er 15. februar. Et kortfattet sammendrag er en viktig del av sluttrapporten. Sammendraget og fullstendig sluttrapport blir lagt ut i Prosjektbiblioteket på ExtraStiftelsens nettsider.”

3. EFFEKTMÅLING

Hvordan måler stiftelsen effekten av støtten?

“Krav til sluttrapporten

Sluttrapporten skal kunne leses som et selvstendig dokument uavhengig av eventuell forkunnskap om prosjektet. Rapporten må ta utgangspunkt i søknaden og i de forutsetninger/kommentarer ExtraStiftelsen har gitt i forbindelse med tildelingen av midlene. Flere av kapitlene i denne veilederen er relatert til punkter i prosjektsøknaden, slik at viktig dokumentasjon kan hentes derfra. Utdypningen i de enkelte kapitlene er ment som forslag og veiledning til hva rapporten kan inneholde.

Forskjell mellom små og store prosjekter

Det stilles ingen faste krav til lengde på sluttrapporten. Hovedsaken er at alle aktuelle forhold rundt prosjektet blir belyst. For mindre prosjekter vil dette være mulig å få til på få sider. Større og/eller flerårige prosjekter krever oftest en mer omfattende rapport.

For enkelte prosjekter vil det være vanskelig å følge kapitellinndelingen. Eksempelvis kan dette gjelde forprosjekter, produksjon av informasjonsmateriell, m.m. Det bør likevel tilstrebes å være innom alle kapitlene.

Egenevaluering

For alle prosjekter (unntatt forskningsprosjektene) skal prosjektleder levere en egenevaluering av prosjektet. Dette er en del av det elektroniske sluttrapport-skjemaet, og består av 13 spørsmål med 5 svarkategorier. Evalueringen benyttes i ExtraStiftelsens arbeid med kvalitetssikring av søknadsprosessen og oppfølgingen av prosjektene.”

4. EVALUERING

Tre ting som vi kan lære av – ta med videre, og tre ting som ikke er så bra

Styrke

- ☺ Veldig god databaser over prosjekter
- ☺ Orienterer at det er ønskelig med evaluering
- ☺ Oversiktlige sluttrapporter

Svakhet

- ☹ Lite informasjon om effektevaluering
- ☹ Uklare prosjektmål

REFERANSER

Informasjonen i dette faktaarket er lastet ned fra stiftelsens webside www.extrastiftelsen.no med mindre det er ført opp andre referanser.

Ford Foundation

<http://www.fordfoundation.org>

Country	Capital – size of the foundation	Donations in 2012
USA	\$ 11 milliarder (64 milliarder NOK)	3,1 milliarder NOK

1. THE FOUNDATION

Background

“The Ford Foundation was established on Jan. 15, 1936, with an initial gift of \$25,000 from Edsel Ford, whose father Henry, founded the Ford Motor Company. During its early years, the foundation operated in Michigan under the leadership of Ford family members. Since the founding charter stated that resources should be used “for scientific, educational and charitable purposes, all for the public welfare,” the foundation made grants to many kinds of organizations.

“After the deaths of Edsel Ford in 1943 and Henry Ford in 1947, it became clear that the nonvoting stock of the Ford Motor Company they bequeathed to the Ford Foundation would create the largest philanthropy in the world. In response, the foundation’s board of trustees, led by Henry Ford II, Edsel’s son, commissioned studies to chart the institution’s future.”

“After thorough review and discussion, the board embraced the report in 1949. A summary published and distributed to the public in 1950 recommended support for activities worldwide that:

- Promise significant contributions to world peace and the establishment of a world order of law and justice
- Secure greater allegiance to the basic principles of freedom and democracy in the solution of the insistent problems of an ever-changing society
- Advance the economic well-being of people everywhere and improve economic institutions for the better realization of democratic goals
- Strengthen, expand and improve educational facilities and methods to enable individuals to realize more fully their intellectual, civic and spiritual potential; to promote greater equality of educational opportunity; and to conserve and increase knowledge and enrich our culture
- Increase knowledge of factors that influence or determine human conduct, and extend such knowledge for the maximum benefit of individuals and society”

These recommendations from 1950 are still key elements of the Foundations engagement.

The Foundation has offices worldwide; United States, Africa and Middle East, Asia and Latin America and the Caribbean.

Purpose – vision and values

“The Ford Foundation supports visionary leaders and organizations on the frontlines of social change worldwide. Our goals for more than half a century have been to:

- Strengthen democratic values
- Reduce poverty and injustice
- Promote international cooperation
- Advance human achievement”

Key areas

According to the 2012 Annual Report, the foundation grant making by program covers the following issues:

1. **Democracy, Rights and Justice** (\$178 billions); Advancing LGBT Rights, Racial Justice and Minority Rights, Protecting Immigrant and Migrant Rights and Women’s Rights, reducing HIV/AIDS Discrimination and Exclusion, reforming Civil and Criminal justice Systems, strengthening Human Rights Worldwide, Increasing Civic and Political Participation, Promoting Electoral Reform and Democratic Participation and Transparent, Effective and Accountable Government, reforming Global Financial Governance and strengthening Civil Society and Philanthropy
2. **Economic Opportunity and Assets** (\$139 billions); building Economic Security Over a Lifetime, ensuring Good Jobs and Access to Services, expanding Livelihood Opportunities for Poor Households, improving Access to Financial Services and promoting the Next Generation Workforce Strategies, connecting People to Opportunity, expanding Access to Quality Housing and promoting Metropolitan Land-Use Innovation, Climate Change Responses that Strengthen Rural Communities, and expanding Community Rights Over Natural Resources
3. **Education, Creativity and Free expression** (\$144 billions); Advancing Media Rights and Access, Advancing Public Service Media, JustFilms, Justice and Media, Religion in the Public Sphere, Supporting Diverse Arts Spaces, Promoting Reproductive Rights and the Right to Sexual

- Health, Supporting Sexuality Research, Youth Sexuality, Reproductive Health and Rights
4. **PRIs – Program related investments** (\$30 billions)
 5. **Other grant actions** (\$35 billions).

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded

“The vast majority of Ford Foundation grants go to organizations. Historically, we have provided a very limited number of fellowship opportunities for individuals, focusing on advanced degrees in areas of interest to the foundation. When available, recipients are selected by universities and other organizations that receive grants from the foundation to support fellowships.”

Who decides what to support

The board of trustees determines the substantive areas and geographic focus of the foundation’s grant making. Within the budget approved by the board, the foundation makes about 1,400 grants throughout the year. The board has delegated authority for approving these grants to the president and senior staff. In addition, trustees serve on one of three program committees that help design strategy for each of the foundation’s major program areas — Democracy, Rights and Justice; Economic Opportunity and Assets; and Education, Creativity and Free Expression. Membership on the committees rotates so that trustees serving 12 years become steeped in the work of each area and contribute to its development and assessment.

The trustees review approved grants at regular board meetings, which take place three times a year, in February, June and October. At those meetings, and during annual board visits to grantees worldwide, trustees meet grant recipients, learn about their work and spend time in the communities that benefit from our grant support. Requirements for projects to be supported.

“Please note: It is important that you use our grant inquiry form—and refrain from contacting program officers directly. Given the volume of inquiries we receive, this allows us to log, track and respond quickly to your application”

Requirements for projects to be supported

“Each year the Ford Foundation receives about 40,000 proposals and makes about 1,400 grants. Requests range from a few thousand to millions of dollars and are accepted in categories such as project planning and support; general support; and endowments. Grant applications are reviewed at our New York headquarters and in our regional offices. Please check

the locations of our regional offices to determine if we operate in your country of interest..

What is not supported

“... we take varied approaches to our work, but there are a number of areas frequently inquired about that we do not support. We do not award undergraduate scholarships or make grants for personal needs or business assistance. We also do not fund health care, vehicle purchase, student loan repayment or inventions. Except for limited grant making through our Good Neighbor Committee to local institutions located near the foundation’s New York headquarters and 10 regional offices, we also do not generally support after-school programs, athletic leagues, orphanages or elder care.”

How the support is reported

No explicit information about reporting. The Foundation has a Grant Database, however, this only contains an overview over projects supported, budget, year, area and a sentence describing the project.

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

Path to change: “As we work with our grantees to create lasting social change, we ask ourselves: Are the foundation's strategic initiatives, approaches and grants achieving the maximum impact they can? Are there adjustments we can make to our strategies or the activities we are supporting that could yield better results?”

We make long-term investments understanding that patient capital and well-reasoned risk are required to chart bold new solutions to seemingly intractable problems. We have ambitious strategies that will take years to carry out, so what we can observe or measure will necessarily be only part of the picture. In many cases, then, our assessments tell us not whether broad social change has finally been achieved, but rather, whether we are on the right path to change. No single grant or grantee can, on its own, bring about the kinds of broad social change we seek, such as improving the transparency and effectiveness of government, preventing gender discrimination, or enabling families to move out of poverty. For this reason, we assess the effectiveness of our work at multiple levels: strategic initiative, general approach and individual grant.”

Continuous learning and improvement: “We engage in continuous learning and improvement—rather than waiting until an initiative ends to begin evaluation. Our assessment approach reflects this idea: with all of our grant-making strategies and throughout each stage of

the process, we assess, learn and then make course corrections as needed.”

A mix of tools and approaches: “We use a combination of tools to assess whether our initiatives are having an impact on social change. How we evaluate depends on where an initiative is in its life cycle. We do not believe that the only choice is between simple quantitative measures of impact and no assessment at all. We believe that sophisticated methods of qualitative and quantitative evaluations, when used appropriately, can provide insight into whether we are being effective in delivering impact to the communities we serve.

We use the best combination of tools and evaluation approaches that are relevant to the initiative at hand. If an initiative is in the early stages of implementation, more qualitative and formative methods are consistent with the need for experimentation. For initiatives that are midstream, we use a more mixed approach, drawing insight from other initiatives with similar theories of change. While we are likely to use some qualitative tools in every assessment, mature initiatives allow for the use of more quantitative methods when the intervention is well defined, target populations are known, and we have a firm idea of what measurable outcomes we can hope to achieve.”

How we share what we learn: “We believe that sharing what we learn is critical, and it is part of our commitment to transparency in all aspects of grant making. The philanthropic sector struggles with evaluating itself, grading itself: understanding whether its work is making a difference. We are always searching for more effective ways to communicate what we are learning, and moving forward, we will continue to solicit and try new ideas and technologies that help facilitate sharing and dissemination. Indeed, our goal is to be an active participant in an ongoing and lively dialogue with leaders—those in the nonprofit sector, government and business as well as fellow funders—who are working in our key issue areas. Such a dialogue helps to sharpen our strategic approach to driving social change.”

4. EVALUATION

Tre ting som vi kan lære av – ta med videre, og tre ting som ikke er så bra

Styrke

- ☺ Åpenhet rundt testing av effektevaluering
- ☺ Utprøving av ulike verktøy for effect måling

Svakheter

- ☹ Lite åpenhet rundt praktiske erfaringer med effektevaluering

- ☹ Lite informasjon om prosjektene som støttes i databasen

INVESTERINGS POLICY

I årsrapporten står det “By managing risk carefully we have achieved strong, stable return on a period of high volatility”, ser ikke noen etiske investerings kriterier i årsrapporten eller på nettsiden.

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.fordfoundation.org med mindre det er ført opp andre referanser.

Robert Wood Johnson Foundation

<http://www.rwjf.org>

Country	Capital – size of the foundation	Donations in 2013
USA	\$9 milliarder (57 milliarder NOK)	NOK 2,3 milliarder

1. THE FOUNDATION

Background

Robert Wood Johnson Foundation is a charitable organization devoted exclusively to health care issues. It was established in 1936 by Robert Wood Johnson (1893-1968), board chairman of the Johnson & Johnson medical products company. The foundation grew in endowment and in the scope of its mission after it in 1971 received the majority of Johnson's estate. Based in Princeton, N.J., the Johnson Foundation's basic mission is "to improve the health and health care of all Americans," and toward this end it supports training, education, research, and projects related to U.S. health-care services (www.answers.com).

The founder Robert Wood Johnson was "One of the 20th century's most innovative and colorful business leaders. He built Johnson & Johnson into a world-renowned company and gave new meaning to the need for corporations to serve the public interest. His generosity created one of the nation's most significant philanthropies dedicated to improve the health and health care of all Americans."

Purpose – vision and values

"Our mission: to improve the health and health care of all Americans."

"As the nation's largest philanthropy devoted solely to the public's health, we have a unique capability and responsibility to address the most pressing health issues facing our society. Our efforts focus on improving both the health of everyone in America and their health care—how it's delivered, how it's paid for, and how well it does for patients and their families. We invest in improving systems through which people receive care and in fostering environments that promote health, and expect to achieve comprehensive, meaningful, and timely change.

We are guided by a fundamental premise: we are stewards of private funds that must be used in the public's interest. Our greatest asset isn't our endowment; it's the way we help create leverage for change.

We create leverage by building evidence and producing, synthesizing and distributing knowledge, new ideas, and expertise. We promote change through partnerships and collaboration, with the goal of building a culture of health for all Americans."

Key areas

"Healthy Weight for All Children"—In 2007, RWJF announced that it would dedicate \$500 million to reversing the childhood obesity epidemic in America. The relentless rise in childhood obesity rates has abated, and in some areas has even decreased. Moving forward, RWJF will stress the importance of achieving a healthy weight for all of our nation's children, especially in poor communities and those of color.

Health Care Coverage For All—For decades, RWJF has worked to improve access to affordable, high-quality coverage for all Americans. The Affordable Care Act has created new opportunities for more than 30 million uninsured Americans to acquire coverage.

Bridging Health and Health Care—For too long being healthy has been defined as not being sick. But good health extends beyond the walls of medical offices to the places where people live, learn, work and play. RWJF will continue to invest in programs that bridge health and health care, balancing treatment with prevention, community action and individual responsibility.

Cost, Quality, and Value—RWJF is committed to seeking the highest value for each dollar spent in the public health, population health, and health care systems.

Healthy Places and Practices—To help build public demand for a culture of health, RWJF will identify, support, and spread the word about individual and community actions that promote lifelong health for all Americans. We are committed to finding strong examples of places and practices reflecting a culture of health, and sharing the lessons they have to offer with others so Americans can link forces and build small victories into a national movement.

Equal Opportunity—Too many Americans still do not have access to equal choices and opportunities to pursue good health. In the past, RWJF has acknowledged the issue of equal opportunity in all of the programs we support.

Vulnerable Populations—RWJF supports finding innovative and effective ways of addressing the many factors that influence the health of our nation's most vulnerable people. Our work in this area will focus on mental wellness and violence prevention, particularly in early childhood.

Discover, Explore, Learn—RWJF recognizes that in order to achieve a culture of health we must continually discover and explore the cutting-edge ideas and

emerging trends that have the potential to accelerate our progress.

21st Century Leadership—RWJF takes great pride in its legacy of identifying leaders with the potential to transform our nation’s health and providing them with the support they need to realize their promise.

The Future of Nursing—RWJF has supported the advancement of the nursing profession for more than 30 years.

Health in Our Home State—RWJF honors the legacy of its founder by supporting work to improve the health and lives of our neighbors in New Jersey.” [some sentences have been removed to compress]

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded

We aim to fund innovative projects that can have measurable impact and can create meaningful, transformative change, such as:

- service demonstrations
- gathering and monitoring of health-related statistics
- public education
- training and fellowship programs
- policy analysis
- health services research
- technical assistance
- communications activities
- evaluations

I 2012;

- 718 prosjekter ble støttet
- Median støtte ca \$ 200 000
- Gjennomsnitt prosjektlengde; 2,6 år
- 39% gitt til universiteter
- 22 % av mottakere var engasjer i advocacy
- 75% av de som fikk hadde fått RWJF støtte tidligere

Who decides what to support

It seems like most applications are reviewed internally. “In many instances, RWJF asks outside experts on a particular topic to review proposals. By doing so, RWJF aims to ensure that we remain fair and rigorous in evaluating proposals.”

“One of our Guiding Principles states, “We must select grantees fairly.” We have processes in place to honor this principle including the requirement that proposal reviewers acknowledge our [title]. Approximately seven percent of proposal reviewers have disclosed a conflict of interest. Those disclosures generally resulted in the reassignment of that proposal to another reviewer. The percentage is lower than what might otherwise be expected because often actual or perceived conflicts are known and avoided in advance by assigning the proposal to another individual for review.”

Requirements for projects to be supported

We generally support public agencies, universities, and public charities that are tax-exempt under section 501 (c)(3) of the Internal Revenue Code.

“We do not fund unsolicited proposals in the Childhood Obesity, Coverage, Human Capital, Public Health, Quality/Equality, or Vulnerable Populations areas. Rather, we support projects in these areas by issuing calls for proposals (CFPs) throughout the year.”

What is not supported

“RWJF does not provide support for:

- ongoing general operating expenses or existing deficits
- endowment or capital costs
- basic biomedical research
- research on drug therapies or devices
- direct support of individuals
- lobbying of any kind.”

“We do not support foreign organizations or make grants to individuals”

How the support is reported

The RWJF has a well organized Grant Archive where it is possible to search different topics. Each project is described, amount awarded, date and timeframe as well as contact person is reported. However, no information about achievement or result is provided.

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

“RWJF spends over \$20 million per year evaluating its major initiatives.”

“Program evaluations are a cornerstone of our efforts to learn from our work. In any given year, the Foundation conducts between 30 to 40 active program evaluations, accounting for about 5 percent of our annual grantmaking.

As with research grants, evaluation grants are quite diverse in size and scope. They range from small program assessments to multimillion dollar outcomes evaluations.”

“To aid our evaluators, we develop tools and other resources such as *The Robert Wood Johnson Foundation Evaluation Series* that serve as guides for evaluators as they begin their assessment of Foundation programs.”

For noen prosjekter er det utviklet Fact sheets på få sider som gir sammendrag av prosjektet og bidrag. På andre studier er det gjennomført omfattende Impact analyser og disse, samt en-sides sammendrag der “key findings” kommer frem er gjort tilgjengelige.

“The Assessment Report is a public version of the Robert Wood Johnson Foundation’s biennial Scorecard, a self-assessment that highlights key indicators of organizational performance.

RWJF is one of the few philanthropies that shares this kind of information publicly—as of 2009, only 13 percent of foundations publish annual reports.”

“Reports that review the Foundation's overall grantmaking trends, and tracks our performance along three key areas: program development; program impact; and customer service.”

2013 Assessment report undersøker hva ulike interessenter synes om RWJF sitt arbeid.

Helseeksperter, politikere, mottakere er de som blir spurt, og svarene blir presentert i grafer. Det rapporteres også hvordan RWJF gjør det i forhold til Indicators, men ikke hva disse indikatorene omfatter. 590 eksperter ble kontaktet pr telefon – 18% response rate.

Det er også mulig å søke på tema og få informasjon om rapporter og ulike typer artikler og media omtale av disse prosjektene.

business is predominantly related to the manufacture or sale of tobacco, alcohol or firearms.”

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.rwjf.org med mindre det er ført opp andre referanser.

4. EVALUATION

Tre ting som man kan lære av – ta med videre og tre ting som ikke er så bra

Styrke

- ☺ Er åpen for å rapportere om interessenters evalueringer av stiftelsen.
- ☺ God informasjon om prosjekter via Fact sheets og Key Findings (men slike er ikke tilgjengelige for alle prosjekter)
- ☺ Forteller hva stiftelsen ikke støtter.
- ☺ Forteller om sin investeringspolicy med begrunnelse.
- ☺ God database som inkluderer media omtale.

Svakheter

- ☹ Orienterer ikke om hva indikatorene det rapporteres om omfatter (skriver for eksempel: 3 indicators, 3 indicators completed)
- ☹ Ikke konkrete mål på webside og i årsrapport.
- ☹ Ikke informasjon om impact i prosjektdatabasen (archive)

INVESTERINGS POLICY

”Because we focus our philanthropy on meeting many of our nation’s most critical health challenges, our long-standing policy has been not to invest in companies whose products may conflict with our health and health care mission, namely those whose

Robin Hood Foundation

<http://www.robinhood.org>

Country	Capital – size of the foundation	Donations in 2012
USA	\$ 482 million (2,9 milliarder NOK)	802 millioner NOK

1. THE FOUNDATION

Background

The Robin Hood Foundation was funded in 1988 by hedge fund manager Paul Tudor Jones. The board of directors consists of celebrities from the financial sector as well as actors. This has contributed to making the foundation well known, as well as being key financial supporters of the foundation.

In 2009 George Soros, a famous business magnet, supported the foundation with US\$ 50 million. This contribution helped the Foundation to raise significantly more than that.

“Robin Hood is New York's largest poverty-fighting organization, and since 1988 has focused on finding, funding, and creating programs and schools that generate meaningful results for families in New York's poorest neighborhoods. Since its founding, Robin Hood has distributed more than \$1.45 billion in grants and initiatives to hundreds of New York City-based soup kitchens, homeless shelters, schools, job training programs, and other vital services that give New York's neediest citizens the tools they need to build better lives for themselves and their families. In addition, Robin Hood's board of directors pays all administrative, fundraising and evaluation costs, so 100% of your donation goes directly to organizations helping New Yorkers in need.”

“The idea behind one of the most innovative and influential philanthropic organizations of our time sprang from one of the more boneheaded macroeconomic calls ever made on Wall Street. Or as hedge fund maestro Paul Tudor Jones tells it, “The biggest error I've ever made had the best possible outcome.”” (Fortune Magazine, 2006)

Purpose – vision and values

Fight poverty in New York City

Key areas

- Education
- Jobs & Economic Security
- Early Childhood & Youth
- Survival

“In 2013, Robin Hood Invested \$ 132 million in over 200 of the best poverty-fighting programs in New York City. In addition, we made more than \$ 70,5 million in grants to hundreds of organizations throughout the tri-state area helping victims of Hurricane Sandy rebuild and recover. While there is great diversity among these programs, they all have one thing in common: they work.”

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded

Education

“Education is the best poverty-prevention method out there. Robin Hood supports superior schools—public, private and parochial—in the city's poorest neighborhoods. These schools emphasize rigorous academics, dynamic leadership and utilize an extended-day and extended-year model. We also support programs that prevent students from falling behind, reinvigorate teaching and provide students with needed mental and social services.”

Jobs & Economic Security

“Robin Hood's job programs have helped thousands of people get jobs, despite such barriers to employment as histories of substance abuse, incarceration and homelessness. We also support organizations that create economic security for low-income individuals by providing legal assistance and help securing public entitlements, as well as financial and legal counseling, free banking services, and loans and technical guidance in starting a business.”

Early Childhood & Youth

“Our early childhood programs attack the toll that poverty exacts at the earliest, most crucial stage of life. These programs have remarkable records of success among the thousands of children they serve, reversing speech and language delays and ensuring that children are better prepared to learn in kindergarten and beyond.

Our work with young adults tackles the plight of disadvantaged youth who need a second chance to improve their educations and find a path to productive adulthood. We invest in a network of opportunities in the community that help disadvantaged young people

get into college and complete their education, or, alternatively, show them how to avoid risks and find a path to obtaining a meaningful job.”

Survival

“Survival is a matter of housing, health, hunger and economic security. We attack the immediate problems of day-to-day survival by providing desperately needed food, shelter and health care. But a bowl of soup, a temporary bed, or one trip to the doctor isn’t enough. Our survival programs are designed to address immediate needs while giving people the ongoing support services and counseling they need to move towards a job and a home, improved health, self-reliance and economic security.”

Who decides what to support

“Applications are accepted year-round, and grant decisions will be made by Robin Hood’s Board of Directors on a quarterly basis. Due to a high number of applications, Robin Hood cannot guarantee that all applications will be considered by the Board at the first meeting after the application is received. If your organization submitted an application but was denied Robin Hood funding in the past, please wait one year from the date of denial before reapplying. After reviewing our guidelines thoroughly, we recommend that you call and speak to the Grants Manager before completing an application. Please complete the entire application. If you wish, you may attach additional material as specified in the New York Common Application Form to your completed application, but please do not send any videos. If the application itself raises questions or poses difficulties, please feel free to contact the Grants Manager for clarification. Once the application has been submitted, you will receive a notice acknowledging its receipt; we ask that you not telephone us to ask about its status. In turn, we will let you know Robin Hood’s decision as soon as possible although decisions may take up to one year.”

“Potential additions to Robin Hood’s core group of grant recipients are screened to determine whether they effectively serve poor New Yorkers. Robin Hood staff members conduct site visits and interviews, analyze outcomes and financial data, perform supplementary research and check references to ensure that Robin Hood is making a sound, smart investment.”

Requirements for projects to be supported

“First time grant requests are generally in the area of \$100,000 to \$200,000. Robin Hood will consider requests for a variety of purposes, including specific programs, salaries or start-up costs. Capital, renovation

and general operating funds are given only to those groups already receiving Robin Hood support.”

What is not supported

“In general, Robin Hood does not make grants to technical assistance providers, other funders, or individuals. Robin Hood does not give grants to distribute propaganda, to attempt to influence legislation or the outcome of any public election or to engage in any activity that is not exclusively charitable, scientific or educational. Robin Hood will not support organizations that discriminate against people seeking either services or employment based on race, sex, religion, age, sexual orientation or physical disability.”

How the support is reported

At the foundation website there is an overview over the 180 projects which were supported in 2013. The overview is alphabetically listed. As most of the projects are channeled through other foundations and organizations, there are links to these organizations in the list.

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

“Robin Hood’s system of metrics, dubbed Relentless Monetization, pursues a powerful ambition: to spend philanthropic money smartly. In Robin Hood’s case, that means spending donors’ money in a manner that cuts poverty as deeply as possible. Our metrics help staff to decide the relative impact of poverty-fighting options. Is money better invested in a high school that graduates 50 more former dropouts or, instead, a job-training program that places an extra 75 unemployed workers in long-term jobs.

To answer the fundamental question of how to measure the relative poverty-fighting success of grants, staff, first, identifies each mission-relevant outcome generated by a grant. For example, school grants boost high school graduation rates and improve the future long-term health of graduates. Next we assign dollar values to those outcomes (staff “monetizes” the value of a high school diploma and improved health). Third, we explicitly compare what happens to participants in our programs—the students in schools we fund; the workers enrolled in our training programs—to what would have happened to them had they in fact not received our help (the latter estimates are known as counterfactual estimates). Finally, we use these estimates to form benefit-cost ratios, which assign a dollar figure to the amount of philanthropic good that a grant does per dollar of cost.

The benefit-cost ratios can be used to compare the impact of one grant against any other, no matter how those grants differ in form and purpose. Robin Hood has put principles to practical use across a large array of poverty-fighting interventions. Health clinics diagnose and treat asthma. How much better off are patients who receive these interventions? Schools help at-risk students earn their high school diplomas. How much does graduation boost future earnings? Micro loans to help immigrant women set up home businesses. By how much do these loans boost family incomes (above what they would have been without the loans)? What is the value of emergency food, shelters for abused women or high quality pre-kindergarten programs. Beyond the purpose of helping staff to decide among rival uses of philanthropic money, Robin Hood's metrics system provides a powerful diagnostic tool by which to isolate the specific factors that make anti-poverty programs succeed or fail.

We base grant decisions on more than arithmetic. Program officers add to the decision mix detailed knowledge about the programs they are asked to fund. Most important, staff recognizes the imprecision and incompleteness of our numerical estimates. They are under constant review and revision. We still have a lot of work to do.”

4. EVALUATION

Tre ting som man kan lære av – ta med videre og tre ting som ikke er så bra

Styrke

- ☺ Har klare mål
- ☺ Benytter cost-benefit ratios
- ☺ Målingen revideres kontinuerlig

Svakheter

- ☹ Fremgangsmåte kan være for omfattende

INVESTERINGS POLICY

Finner ikke noe om dette på stiftelsens hjemmeside eller annen vurdering av stiftelsen.

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.robinhood.org med mindre det er ført opp andre referanser.

Rockefeller Foundation

<http://www.rockefellerfoundation.org>

Country	Capital – size of the foundation	Donations in 2013
USA	\$ 3,7 milliarder (22 milliarder NOK)	850 millioner

1. THE FOUNDATION

Background

The Rockefeller Foundation was founded by John D. Rockefeller, Sr. and his son John D. Rockefeller, Jr. in 1913. The family fortune was among others based on Standard Oil, later Exxon. The Rockefeller Foundation was one of the first major charity institutions (the second-oldest after the Carnegie Corporation). Therefore, this foundations development and experiences have had major impact on many of the large foundations which have been formed and developed since.

The foundation mission “At The Rockefeller Foundation, we embrace a set of core values to guide our work to promote the well-being of humanity throughout the world“, is quite broad, and the focus on engagement has changed and developed over time.

“For more than 100 years, The Rockefeller Foundation’s mission has been to promote the well-being of humanity throughout the world. Today, we pursue this mission through dual goals: advancing inclusive economies that expand opportunities for more broadly shared prosperity, and building resilience by helping people, communities and institutions prepare. The Foundation operates both within the United States and around the world. The Foundation’s efforts are overseen by an independent Board of Trustees and managed by its president through a leadership team drawn from scholarly, scientific, and professional disciplines.”

Purpose – vision and values

“At The Rockefeller Foundation, we embrace a set of core values to guide our work to promote the well-being of humanity throughout the world.

Leadership: We take steps to achieve our vision of a better world and inspire others to join us.

Equity: We enable broad and fair access to resources and networks that facilitate inclusion of diverse people and perspectives.

Effectiveness: We work to achieve impact by using efficient and creative processes in our work to accomplish short and long-term goals.

Innovation: We believe in the potential of ideas to transform the lives of people and build stronger social relationships. We invest in new work along a spectrum from discontinuous to incremental.

Integrity: We make decisions transparently, in line with our values and mission, acting with candor and courage.”

Key areas

Revalue Ecosystems

“Environmental degradation and stresses—including resource consumption, habitat destruction, and waste production—affect the entire global community, but disproportionately impact the world’s poor or vulnerable.

We move beyond preservation or conservation efforts to seek out new approaches to integrate environmental accountability into economic and social systems in order to preserve the fundamental resilience of the planet.”

Current work: Climate Change Resilience, Impact Investment, Smart Power in India, Food Security, Oceans & Fisheries

Secure Livelihoods

“The livelihoods of entire groups of people are threatened by demographic shifts and economic stresses worldwide, such as the migration from rural areas to urban centers, the youth bulge in Africa, and significant unemployment and underemployment in Europe and the United States.

We promote new approaches to economic goals, development and management to foster sustainable growth models upon which prosperity is more widely--and equitably--shared.”

Current Work: Food Security, Transportation, Program Related Investment (PRI), Impact Investing, Smart Power in India, Digital Jobs Africa

Transform Cities

“Embracing urbanization to catalyze equity

The majority of people on the planet now live in cities, creating new vulnerabilities to health and economic well-being, as well as greater pressures for urban planning and governance—all of which require new strategies for building resilience for individuals, communities and regions. Cities are also places of enormous innovation and opportunity.

We take a systemic approach to issues facing urban areas—such as climate change, sustainable infrastructure systems, and innovation for informal economies—with a focus on spurring more equitable growth across societies.”

Current Work: Climate Change Resilience, Transportation, Smart Power in India, 100 Resilient Cities Centennial Challenge

Advance Health

“Creating incentives for better nutrition and wellness

Individual and collective health is threatened by an array of challenges, including food insecurity and poor nutrition, infectious and non-communicable diseases, and an aging population.

We support innovative strategies that incentivize individuals, communities and governments to address the breadth of variables that contribute to healthy societies, ranging from agriculture to waste and from clean water to resilient health systems.”

Current Work: Universal Health Coverage, Food Security, Impact Investing

2. WHAT THE FOUNDATION SUPPORTS

Type of initiatives funded and requirements for projects to be supported

“The Rockefeller Foundation focuses its resources on four related issues areas and fund a portfolio of initiatives that work across these areas, linking and interlinking, to achieve meaningful and measurable impact.”

“All our initiatives draw on the Foundation’s commitment to nurture innovation, pioneer new fields, expand access to and distribution of resources, and, ultimately, generate sustainable impact on individuals, institutions, and communities.”

“If you would like the Rockefeller Foundation to consider funding your project—which must fit within one or more of the Rockefeller Foundation initiatives - please complete the following application. This online application is the only way in which we receive and respond to unsolicited proposals from people and organizations who have access to the Internet, so we

ask that you not send proposals by mail or email unless invited to do so. If we see a potential fit with any of our initiatives, based on your answers to the following questions, we will respond by asking you to submit a full proposal”

“To submit your funding inquiry, please fill out the form below [fire enkle felt]. Questions marked with asterisks (*) are required. Please limit your answers to questions 1-3 to 100 words. All submissions must be in English. Please note that once we receive your funding inquiry, we will send you a confirmation email.”

To illustrate “attitude” towards applicants: “We are a proactive grantmaking organization. As a result, we seek further information on an extremely small number of requests. Even fewer are funded.” “Please do not contact us about the status of your inquiry. Typically, it takes up to six weeks to review and reply to submissions.

A “light search” revealed that there were 731 projects under \$ 100 000 (all the way down to \$ 20 000) and 200 over \$ 1 million.

Who decides what to support

No specific information about how decisions are made except “The Foundation's efforts are overseen by an independent Board of Trustees and managed by its president through a leadership team drawn from scholarly, scientific, and professional disciplines.”

What is not supported

The Rockefeller Foundation does not:

- (1) give or lend money for personal aid to individuals (sometimes referred to as cash grants),
- (2) offer direct fellowships outside our core initiative work, or,
- (3) except in rare cases, provide general institutional funding, contribute to endowments, or support building or operating funds

“In 2006, The Rockefeller Foundation underwent a major shift in funding strategy. Some of the areas for which we used to provide major support are no longer areas of focus, including education reform, peace and security, and international arts and humanities. If your project is outside of our current work, we strongly advise you seek other funding resources.”

How the support is reported

The Foundation website has a good archive of projects to search in. The most recent annual report lists the about 400 grantees of 2012.

3. EFFECT EVALUATION

How does the foundation measure the effect of the support?

“We Focus on Global Impact The Rockefeller Foundation maintains a portfolio of interconnected initiatives, each of which commits to specific, measurable goals within a projected timeframe and incorporates rigorous monitoring as work progresses, while remaining flexible enough to seize unanticipated opportunities, shift tactics when necessary, and recalibrate when longer or shorter-term engagements are needed.”

“Each initiative is designed to accomplish specific goals within projected time frames, usually three to five years. We monitor and assess our grantees’ effectiveness regularly. These requirements enable the Foundation to shift tactics when necessary, seize unanticipated opportunities, and recalibrate our approach when a problem demands shorter- or longer-term investment.”

På stiftelsens hjemmeside er en evaluering av Sustainable Employment in a Green US Economy (SEGUE), et \$ 15 millioner prosjekt fra 2009 - 2012, evaluert etter 10 mål delt opp i følgende tre felt; Purpose 1: Learning, Purpose 2: Accountability, Purpose 3: Public Good.

4. EVALUATION

Tre ting som man kan lære av – ta med videre og tre ting som ikke er så bra

Styrke

- ☺ Har for-evaluering, så det ikke er nødvendig å skrive store søknader før man vet at prosjektet muligens er relevant.
- ☺ Prosjektene har konkrete mål

Svakheter

- ☹ Dårlig rapportering om effektmåling
- ☹ Få eksempler på evalueringen og score stiftelsen skriver om

INVESTERINGS POLICY

“Employs negative screening for tobacco companies. Social investing guidelines include evaluating some investment with an investment screen first and then a social screen. Makes for-profit impact investments and program-related investments.” www.ussif.org

REFERANSER

All informasjon I dette faktaarket er lastet ned fra stiftelsens webside www.rockefellerfoundation.org med mindre annet er oppgitt.

Sparebankstiftelsen DNB

<http://sparebankstiftelsen.no/>

Land	Kapital – stiftelsens størrelse	Utdeling 2013
Norge	10 milliarder NOK	132 millioner NOK

1. STIFTELSEN

Bakgrunn - initiativtakere

“Sparebankstiftelsen DNB er en av Norges største allmenntilrette stiftelser. Stiftelsen ble etablert høsten 2002 da tidligere Gjensidige NOR Sparebank ble omdannet til aksjeselskap. Sparebankfondet ble da lagt i en nyopprettet stiftelse og kapitalen ble benyttet til aksjeinnskudd i den omdannede banken. Gjensidige NOR ASA og DnB Holding ASA slo seg i 2003 sammen til DnB NOR (nå DNB). Sparebankstiftelsen DNB er i dag største private eier i DNB, med i underkant av 10 prosent av aksjene.

I 2013 endret stiftelsen navn fra Sparebankstiftelsen DNB NOR til Sparebankstiftelsen DNB. Navneendringen ble vedtatt av generalforsamling 30. januar, og praktisert fra 2. april.”

Formål – Visjon og verdier

“Sparebankstiftelsen DNB har to formål:

1. Videreføre sparebanktradisjoner, blant annet gjennom å gi bidrag til allmenntilrette formål.
2. Være en langsiktig og stabil eier av aksjer i DNB og derigjennom støtte opp under virksomheten til landets største finanskonsern.”

“«Vi skal utløse gode krefter» er Sparebankstiftelsen DNBs visjon. Stiftelsen baserer sin virksomhet på følgende verdier: uavhengig, langsiktig og åpen.”

Kjerneområder

“Sparebankstiftelsen DNB gir støtte til følgende områder: [antall prosjekter i 2013]

- Kunst og kultur [42]
- Kulturminner og historie [90]
- Nærmiljø, idrett og lek [8]
- Friluftsliv og naturkunnskap [263]

For de lokale gavene prioriterer stiftelsen det geografiske området som ble dekket av den sparebanken vi springer ut av. Dette er fylkene Østfold, Oslo, Akershus, Oppland, Buskerud, Vestfold og Telemark, samt kommunen Ringsaker i Hedmark.”

2. HVA STIFTELSEN STØTTER

Hva slags tiltak støttes

“Sparebankstiftelsen DNB støtter prosjekter som skaper engasjement, som har verdi over tid, som involverer frivillige og som gir et positivt bidrag til barn og unge. Ønsket er at gavene skal være en inspirasjonskilde for enkeltmennesker og ulike typer organisasjoner, slik at de kan få realisert sine ideer og tiltak til glede for allmennheten. Dette har vi uttrykt gjennom vår visjon: «Vi skal utløse gode krefter».”

Hvem bestemmer hva som støttes

”Stiftelsens øverste organ er generalforsamlingen, og denne velger styret. Den årlige ordinære generalforsamlingen setter de økonomiske rammene for gavetildelingene, mens styret bestemmer hvilke områder stiftelsens midler skal brukes til. Styret fatter også vedtakene om hvem som skal få pengestøtte etter innstilling fra administrasjonen.

Sammensetningen av generalforsamlingen gjenspeiler de regionene hvor tidligere Gjensidige NOR Sparebank har sitt utspring og hvor sparebankenes fond over tid ble bygd opp.

Den velges for fire år av gangen og består av 16 representanter valgt av og blant kundene i DNB og 15 representanter oppnevnt av fylkestingene i de regionene der banken har sitt utspring (Østlandet).

Den årlige ordinære generalforsamlingen godkjenner årsresultatet og fastsetter disponeringen av overskuddet, mens det er stiftelsens styre som bestemmer hvilke områder stiftelsens midler skal brukes til, og som vedtar hvem som skal få støtte.

Siste valg av kundenes representanter til generalforsamlingen var i mars 2014. Kundene stemte via nettbanken til DNB, og kandidatene ble valgt for perioden fra 21. mai 2014 til 2018. Fylkestingsvalget til generalforsamlingen fant sted våren 2012.”

“Gavesøkere, forretningsforbindelser, myndigheter og allmennheten må til enhver tid ha tillitt til vår profesjonalitet og integritet. Derfor er det utarbeidet etiske regler som inneholder generelle prinsipper for aktsomhet og gode råd for å sikre uavhengighet og unngå interessekonflikter.”

Krav til prosjekter som støttes

- “Gjennom gavevirksomheten ønsker Sparebankstiftelsen å bidra til et samfunn med flere skapende, aktive og ansvarsbevisste individer.
- Gavene skal sette personer, grupper og institusjoner bedre i stand til å få gjennomført ideer og tiltak til beste for allmennheten. Frivillig sektor og ideelle virksomheter er foretrukne mottakergruppe.
- Gaver kan bevilges til hel eller delvis finansiering av prioriterte ideer, objekter og tiltak.
- Gavene skal særlig gi stimulans og opplevelse til mennesker i alderen 6 til 30 år.
- Alle gaver skal gi effekt for flere enn en liten gruppe mennesker og fortrinnsvis ha en viss varighet.
- Gaver kan gis i samarbeid med andre organisasjoner. Sparebankstiftelsen kan også samarbeide med andre om realisering av de ideene en gave bygger på.”

”Prioriteringene av allmennyttige tiltak bygger på verdier som stiftelsen mener er viktige for samfunnets utvikling:

- *Kulturell forankring:* Tiltak som bygger kulturelle broer mellom fortid, nåtid og fremtid.
- *Deltakelse:* Tiltak hvor enkeltpersoner eller frivillige fellesskap tar initiativ til dugnader og aktiviteter i nærmiljøet.
- *Engasjement:* Tiltak hvor kultur eller natur er utgangspunktet for å berike og berøre enkeltmennesker.
- *Ansvar:* Prosjekter og aktiviteter hvor den enkelte tar et ansvar for egen og andres utvikling, og løfter verdifulle prosjekter til beste for samfunnet.

Siden starten i 2002 har Sparebankstiftelsen DNB bidratt med mer enn to milliarder kroner til allmennyttige formål. Stiftelsen gir allmennyttige bidrag i form av gaver til lokale og nasjonale prosjekter i tillegg til en rekke andre tildelinger og initiativer.”

Søknadsskjema fylles ut og sendes via nettside. Det er to årlige søknadsfrister pr år, 15.2 og 15.9.

Hva som ikke støttes

Prosjektet som ikke er innenfor årets formål støttes ikke.

Prosjekter utenfor Østfold, Oslo, Akershus, Buskerud, Vestfold og Telemark, Oppland og kommunen Ringsaker i Hedmark støttes ikke. (Prosjekter i utlandet støttes altså ikke.)

Sparebankstiftelsen kan ta initiativ til breddegaver. Det kan også søkes til nasjonale prosjekter gjennom hele året, da via e-mail til stiftelsen.

Hvordan det rapporteres om støtten

På stiftelsens hjemmeside er oversikt over prosjekter som har fått støtte tilgjengelig, på årsbasis. I listen over prosjekter valgt år, kan man trykke seg inn til selve prosjektet. Dette er beskrevet med noen setninger, inkludert beløp. Det er felt for Fylke og Gavetype.

“I 2013 tok stiftelsen i bruk et nytt system for gavesøknader og saksbehandling. Systemet er tilrettelagt for både søknadsbehandling og for elektronisk oppfølging av prosjekter som får tildelt midler. Det er styrets vurdering at systemet både forbedrer kvaliteten og effektiviserer prosessen.”

Årsrapporten for 2013 inneholder oversikt over hva som var støttet i dette året. Leser må ha passord for å ha adgang til sluttrapport.

3. EFFEKTMÅLING

Hvordan måler stiftelsen effekten av støtten?

Det kommer ikke klart frem til hvilken grad og hvordan stiftelsen evaluerer effekten av sin støtte. I årsrapporten for 2013 (31 sider) nevnes ordet “effekt” følgende tre ganger; effektivisering, likviditetseffekt og “Effekten av en gave blir stor når den spres lokalt utover større områder. “evaluering” og “måling” nevnes ikke i årsrapporten. På stiftelsens hjemmeside er det 15 treff på effekt, to treff på evaluering og 12 treff på måling.

4. EVALUERING

Tre ting som vi kan lære av – ta med videre, og tre ting som ikke er så bra

Styrke

- ☺ God beskrivelse av prosessen for søknads-evaluering.
- ☺ Etiske retningslinjer kommer klart frem.
- ☺ Nytt system for søknadsoppfølging (men mindre klart hva dette innebærer).

Svakhet

- ☹ Mangel på konkrete mål i søknader og evalueringsprosesser
- ☹ Lite om effektevaluering
- ☹ Uklar forvaltningspolicy

INVESTERINGS POLICY

Etisk forvaltning “Det skal i forvaltningen utvises særlig aktsomhet med hensyn til investeringer som utgjør en uakseptabel risiko for medvirkning til uetiske handlinger, krenkelse av menneske- og arbeidstakerrettigheter, korrupsjon og miljødeleggelse.”

REFERANSE

Informasjon fra sparebankstiftelsen.no

Tryg Fonden

<http://www.trygfonden.dk>

Land	Kapital – stiftelsens størrelse	Utdeling 2014
Danmark		Kan anvende 550 mill.Dkr (wikipedia)

1. STIFTELSEN

Bakgrunn - initiativtakere

“TrygFonden smba (selskab med begrænset ansvar) er en del af TryghedsGruppen smba, der ejer og udvikler virksomheder inden for sundhed, sikkerhed og forsikring - og som med 60% af aktierne er hovedaktionær i forsikringskoncernen Tryg.

Vi har heddet TrygFonden siden 2004, men allerede fra 1998 har vi uddelt midler til og arbejdet for at øge trygheden i Danmark.

Beslutningen om at give danskerne ny viden og værktøjer til at forvandle utryghed til tryghed blev truffet syv år efter, at Tryg Forsikring i 1991 var blevet omdannet til et aktieselskab.

Den formue, selskaberne gennem generationer havde sparet op, blev dengang samlet i TryghedsGruppen smba. Og det er en del af afkastet fra denne formue, som TrygFonden i dag bruger til at gøre danskernes hverdag mere tryg.

TrygFonden støtter hvert år hundredvis af projekter, der øger trygheden både lokalt, på tværs af regioner og i hele landet. I 2013 anvender TrygFonden 550 millioner kroner på tryghedsskabende aktiviteter.”

Formål – Visjon og verdier

“TrygFonden arbejder uafhængigt med et almennyttigt formål om at øge trygheden i Danmark inden for kerneområderne sikkerhed, sundhed og trivsel.”

Kjerneområder

“TrygFonden støtter projekter, der øger trygheden for dig og alle andre i Danmark inden for kerneområderne sikkerhed, sundhed og trivsel.

Vores mål er at øge trygheden ved at fremme sikkerhed, sundhed og trivsel i Danmark, og vores ambition er at skabe samfundsmæssig forandring inden for disse tre kerneområder. Under vores tre kerneområder har vi yderligere 11 fokusområder.

Vi har en overordnet strategi for hver af de tre kerneområder samt en strategi for hver af de 11 underliggende fokusområder. Dertil kommer en selvstændig forskningsstrategi. Strategierne er fundamentet for alle vores aktiviteter.”

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- *Sikkerhed:* Aktiv sikkerhed giver os frihed til at leve et mer ubekymret liv. Fokus på respekt for vand, sikker i trafikken og forebyg brand.
- *Sundhed:* Sundhed betyr at flere kan leve længere og bedre liv. Fokus på leve sundt, mental sundhed, akut hjælp, lev med kronisk sygdom og patient først.
- *Trivsel:* Trivsel betyder muligheder for at realisere sit potentiale. Fokus på en chance i livet, en plads i fællesskabet og et liv uden kriminalitet.

2. HVA STIFTELSEN STØTTER

Hva slags tiltak støttes

“I TrygFonden arbejder vi for at skabe mere tryghed i Danmark via tre forskellige roller: som driver, som partner eller som donor.

Driver: TrygFonden igangsætter aktivitet eller forskning. TrygFonden Kystlivredning, TrygFonden Hjertestart og TrygFonden Besøgshunde er tre eksempler på vores driveraktiviteter.

Partner: Vi indgår samarbejde med kompetente partnere og har i øjeblikket 17 partnerskaber blandt andet inden for akutindsatser, trafikssikkerhed, patientsikkerhed, sundhedsfremme og sygdomsforebyggelse.

Donor: Vi modtager hvert år godt 3000 ansøgninger om støtte til lokale eller nationale tryghedsskabende aktiviteter. Fra større projekter - herunder forskning - til udstyr og kurser.”

Hvem bestemmer hva som støttes

“I TrygFonden arbejder vi for at skabe mere tryghed i Danmark inden for kerneområderne sikkerhed, sundhed og trivsel.

I arbejdet indtager vi tre forskellige roller: Som driver, hvor vi selv initierer indsatsen, som partner, hvor vi samarbejder med en anden aktør om projektet eller som donor, hvor vi støtter projektet økonomisk.

Vær opmærksom på at driver- partner- og forskningsprojekterne altid er landsdækkende. Og at forskning kan indgå i både driver- partner- og donorprojekter” (Projecter)

“TrygFonden ønsker at være en strategisk tænkende, aktiv og dagsordensættende initiativtager til tryghedsskabende aktiviteter.

For at nå vores mål - øge trygheden i Danmark - arbejder vi med en række processer, som hjælper os med at afgøre, hvordan vi bedst bruger vores tid, kræfter og midler.

Rammen om vores arbejde er en kontinuerlig livscyklus, der omfatter fire nøglefaser: Udarbejde strategi, starte aktiviteter, evaluere og justere strategien.

Rettesnoren for hvad vi gør, hvorfor vi gør det, og hvordan vi gør det, er de principper, vi har defineret for tildeling af midler.” (Sådan arbejder vi)

“TrygFondens donationsprojekter skal komme så mange som muligt til gode i lokalsamfundet eller på landsplan.

- **Projektet skal høre naturligt ind under et fokusområde**

For at et projekt kan komme i betragtning til støtte, skal det høre ind under et af TrygFondens fokusområder.

- **Projektet er lokalt eller landsdækkende**

TrygFondens regionale råd behandler ansøgninger til projekter, der foregår i lokale miljøer og kommer den lokale befolkning til gode. TrygFonden behandler ansøgninger, der er landsdækkende, eller som går på tværs af to eller flere regioner.

- **Projektet skal komme så mange som muligt til gode**

Projektet skal være til glæde for så mange som muligt i lokalsamfundet eller på landsplan, og der skal for hvert projekt ligge en formidlingsplan, som redegør for, hvordan projektets resultater skal kommunikeres.

- **Projektet må gerne være flerårigt**

Projekterne kan strække sig over flere år” (Principper for uddeling)

Krav til projekter som støttes

“TrygFondens projekter er handlingsrettede, langsigtede og baseret på viden. Vores engagement er altid synligt.

- **Projekterne er handlingsrettede**

TrygFonden støtter og udvikler konkrete og handlingsrettede projekter, der er tæt på danskernes hverdag. Vi møder målgruppen der, hvor utrygheden opstår, fx på stranden, i trafikken, på hospitalet, og her tilbyder vi viden, aktiviteter og værktøjer, der sætter modtageren i stand til selv at handle og forebygge.

- **Projekterne er langsigtede**

Vores projekter er ofte langsigtede. Dels fordi udviklingen af et projekt kræver et grundigt forarbejde, og dels fordi vi ønsker at involvere projektets

målgruppe og på længere sigt motivere til at handle og ændre adfærd.

- **Projekterne er baseret på partnerskaber**

Jo flere vi er, jo mere ved vi. Derfor indgår TrygFonden samarbejde med partnere, der bidrager med ekspertviden, kompetencer og erfaring på projekterne. Det er vores klare overbevisning, at partnerskaberne øger projekternes værdi.

- **Projekterne er baseret på viden**

Alle projekter er baseret på dokumenteret viden om det område, projektet retter sig mod. Denne viden kan være dokumenteret i fx analyser, forskningsrapporter og statistikker. Der er ofte også knyttet forskning direkte til projekterne.”

Hva som ikke støttes

“For at søge støtte, skal dit projekt høre ind under vores kerneområder og fokusområde.”

Hvordan det rapporteres om støtten

“Rammen om TrygFondens arbejde, er en kontinuerlig livscyklus, der indbefatter fire nøglefaser.”

“Fase 1: Udarbejde strategi

Fundamentet for TrygFondens arbejde er strategien, der hjælper os med at definere målene inden for vores kerne- og fokusområder

Hvert år reviderer vi TrygFondens strategi, som er udgangspunktet for TrygFondens årlige handlingsplan.

Strategien lægger op til systematisk udvælgelse af de bedste aktiviteter, samarbejdspartnere samt støttemodtagere og sætter fokus på opfølgning og evaluering af projekter og forskning.

TrygFondens strategi består af

- Den overordnede strategi.
- Strategier for kerneområderne sikkerhed, sundhed og trivsel.
- Delstrategier for TrygFondens 10 fokusområder.
- En forskningsstrategi.
- En evalueringsstrategi.
- En donationshåndbog, der præciserer og effektiviserer arbejdsgange i ansøgningsprocessen.
- En kommunikationsstrategi.
- I den årlige handlingsplan, præsenterer vi strategien og vores driver- og partnerprojekter”

“Fase 2: Starte aktiviteter

TrygFonden kan være involveret i nye aktiviteter på tre måder: som driver, som partner og som donor.

TrygFonden arbejder for at øge trygheden ved at igangsætte aktiviteter, samarbejde omkring projekter eller gennem donationer.

Vores projekter bygger altid på dokumenteret viden og vil vælge samarbejdspartnere, der kan bidrage med erfaring og kompetence.

Kommunikationen er central for alle aktiviteter, vi er involveret i. Den viden, vi akkumulerer, skal formidles på vedkommende, aktiverende, levende og tilgængelig vis, så danskerne opmuntres til at tage ansvar for egen og andres tryghed.”

“Fase 3: Evaluere

TrygFonden arbejder for i stigende udstrækning at måle om vores indsatser er med til at redde liv, mindske lidelse eller påvirke adfærd.

I TrygFonden forsøger vi at sætte konkrete mål for vores driver- og partnerprojekter.

Alle vores projekter, skal leve op til et eller flere af vores tre faste målepunkter: Redde liv, mindske lidelse og/eller påvirke adfærd.

Vi evaluerer hvert år vores driver- og partnerprojekter forud for justeringen af vores strategi. Evalueringen er et uundværligt instrument og integreret i vores arbejde.

Evalueringen hjælper os til at afgøre, om vi skal ændre en given indsats, om vi skal intensivere den, eller om vi skal stoppe den og i stedet bruge ressourcerne et andet sted.

På samme måde skal ansøgere til donorprojekter udpege mål for deres projekter - og selvevaluere deres projekt senest tre måneder efter afslutningen.”

“Fase 4: Justere strategi

En gang om året justerer vi vores strategi ud fra den evaluering af vores arbejde, vi har gennemført.

En kontinuerlig øget gennemslagskraft, kvalitet, professionalisering og fokusering er omdrejningspunktet for TrygFondens strategi. Målet er, at vi lærer hele tiden.

Når vi justerer strategien, trækker vi på viden fra evalueringer og vores samarbejdspartnere.

Efterfølgende godkendes strategien og handlingsplanen af TrygFondens bestyrelse.

TrygFondens strategi består af

- Den overordnede strategi.
- Strategier for kerneområderne sikkerhed, sundhed og trivsel.
- Delstrategier for TrygFondens 10 fokusområder.
- En forskningsstrategi.
- En evalueringsstrategi.
- En donationshåndbog, der præciserer og effektiviserer arbejdsgange i ansøgningsprocessen.
- En kommunikationsstrategi.”

3. EFFEKTMÅLING

Hvordan måler stiftelsen effekten av støtten?

“Som donationsmodtager skal du evaluere det projekt, du har fået støtte til, så vi kan lære af resultaterne og videreformidle dine erfaringer

Omkring halvdelen af TrygFondens budget går til regionale og landsdækkende donationer. Alle de projekter, TrygFonden støtter, skal leve op til et eller flere af vores tre faste målepunkter: Redde liv, mindske lidelse og/eller påvirke adfærd.

Som ansøger forpligter du dig til at evaluere dit projekt, når det er slut. Hvis projektet er af en vis størrelse, kan det være en god idé at definere nogle milepæle undervejs: Det kan hjælpe dig, når du skal udarbejde din evaluering.

Alle donationsmodtagere skal senest 3 måneder efter projektafslutningen udfylde et elektronisk evalueringsskema. Når vi modtager din evaluering, lægger vi den ind i projektsøgeren - under dit projekt.”

“Halvdelen af TrygFondens budget går til regionale og landsdækkende donationer. Evalueringen af donationsprojekterne er helt central, fordi vi derigennem kan lære af resultaterne og videreformidle erfaringerne.”

Sådan evaluerer vi

“Alle donationer over 10 millioner kr. bliver evalueret af et uafhængigt panel, som vurderer i hvor høj grad projektet har levet op til sit formål, og om den viden, som projektet har frembragt, er blevet forankret. Donationer mellem 5 og 10 millioner kroner bliver evalueret på samme måde - men evalueringen bliver udført af en enkelt evaluator.”

Evaluerings rapporter fra diverse projekter gennemført af eksterne er tilgængelige fra stiftelsens hjemmeside, for eksempel Evaluering av natteravnene (Dkr 3 mio), Akutlæge helikopteren (Dkr 4 mio), Interventionsforskning (Dkr 0,4 mio) etc.

4. EVALUERING

Tre ting som man kan lære av – ta med videre og tre ting som ikke er så bra

Styrke

- ☺ Fokus på evaluering
- ☺ Klar strategi for fremdrift
- ☺ Fokus på læring

Svakhet

- ☹ Ikke informasjon om forvaltningspolicy
- ☹ Uklar fremgangsmåte for vurdering av mindre projekter

INVESTERINGS POLICY

Det kommer ikke frem informasjon når det søkes på SRI på fondets hjemmeside. Det er investert i Den Sociale Kapitalfond. “Med 25 mio. kr. fra TrygFonden er Danmarks første sociale venturefond nu en realitet.”

REFERANSER

All informasjon i dette faktaarket er lastet ned fra stiftelsens webside www.trygfonden.dk med mindre det er ført opp andre referanser.

Handelshøyskolen BI er en av Europas største utdanningsinstitusjoner med over 20.000 studenter. Som Norges fremste tilbyder av økonomisk-administrativ utdanning bygger BI på en unik tradisjon med å kombinere faglig tyngde og næringslivsrelevans. Studiene spenner fra bachelor til master og doktorgradsutdanninger. BI er også kjent for sine skreddersydde løsninger for etter- og videreutdanningsmarkedet. BI innehar noen av Europas ledende vitenskapelige miljøer innenfor fagområdene økonomi, strategi, markedsføring og ledelse. Som ansatt ved BI vil du møte spennende utfordringer i et engasjerende og internasjonalt miljø, med over 800 kollegaer som daglig bidrar til utviklingen av kunnskapssamfunnet.