



THE CASE FOUNDATION: PEOPLE, TECHNOLOGY, AND IDEAS

The work we ushered in really went out to the community and said: ‘What do you want and need?’ Everything, even our business planning process, has changed because of that. We start with what the communities are saying they want to do. That’s been such an important turning point for us.

—Jean Case, CEO and Cofounder, the Case Foundation

In 1997, Jean Case and her husband Steve created the Case Foundation. The couple both had successful careers in the technology sector—Steve as founder of America Online, Inc. (AOL) and Jean as a senior AOL executive. As a result, the Case Foundation based its strategy on technology, entrepreneurship, and innovation.

The foundation soon became known for new approaches to philanthropy that used the web’s power to engage citizens in unprecedented ways. Examples include the Make It Your Own Awards (**Exhibit 1**), which invited individuals or groups to submit ideas for solving social problems online and awarded grants to the finalists, as well as America’s Giving Challenge, which encouraged people to integrate giving into their daily lives by using the web and social media.

The foundation also focused on what were then considered new approaches to tackling social problems, such as social entrepreneurship, impact investing, and private sector partnerships. However, in developing what they referred to as a “market-based” strategy, Jean Case, the foundation’s CEO, first had to learn that she could draw on her experience in business to shape her philanthropic values, processes, and decisions. This recognition led her to use technology as a critical philanthropic and social change tool, apply an entrepreneurial approach to experimentation and failure, and harness the private sector’s power to help find solutions to social challenges.

Lecturer Laura Arrillaga-Andreessen and Sarah Murray and prepared this case as the basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation.

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Importantly, Jean’s marketing experience and use of focus groups led her to develop “citizen-centered philanthropy,” an approach in which any individual could connect with peers and define and solve problems themselves. This provided new access for individuals to help bring about change without being dependent on existing programs or campaigns, experts, or large organizations. Citizen philanthropy became central to the way the foundation approached social change.

The foundation’s 2012 Be Fearless campaign encapsulated many of these philanthropic approaches and provided the organization with an innovative lens through which to view future philanthropic strategies.

INTRODUCING THE CASE FOUNDATION: BACKGROUND AND EARLY DAYS

In the 1980s, based in Washington D.C., Jean and Steve Case were at the heart of the Internet’s early days. At this point, only a small percentage of Americans were online, but the web was already beginning to transform everything from travel to shopping. Both Jean and Steve played critical roles in turning AOL, a digital content and service provider, into a major global brand.

Jean’s experience in the early Internet days gave her a deep understanding of digital media’s power. She had held strategic marketing positions at the Information Services Division of General Electric and at The Source, the U.S.’s first consumer-facing online service. At AOL, Jean led the marketing and branding effort that launched AOL and helped turn the company into a household name. She also directed the communications strategy for taking the company public.

At AOL, Jean and Steve created the AOL Foundation, which allowed the couple to explore the relationship between technology and social change. The foundation’s mission was to “use online technology to benefit society, improve the lives of families and children, and empower the disadvantaged.”¹

In 1999, the AOL Foundation funded 54 educational technology projects in schools, communities, and youth-serving organizations through its Interactive Education Initiative. The idea was to maximize the use of technology in K-12 classes while also developing models and best practices that could be replicated elsewhere.

It is not surprising, then, that the Case Foundation chose the “digital divide” as its first major issue. They recognized that while technology and the web were becoming powerful tools in both business and daily life, a divide was emerging between those who had access to these tools and those who did not.

In 1999, as an additional response to the digital divide, AOL created a five-year initiative called PowerUp: Bridging the Digital Divide, which helped create almost 1,000 technology centers in underserved neighborhoods across the United States. The idea was to equip young people with

¹ Center for Children and Technology, AOL Foundation, Interactive Education Initiative Year 1 Evaluation Report, CCT Reports, September 1999.

the skills and resources they would need to build successful careers and fulfilling personal lives in the digital age.

Importantly, the initiative brought together organizations and individuals from the nonprofit sector, business, and government. This approach foreshadowed much of the Case Foundation's subsequent work.

While it was clear to Jean that the foundation would focus on issues such as the digital divide, she recognized that she needed to take time to assess how the foundation could add value. "When I took the role of leading the foundation, I thought I had to become someone else," explained Jean. "And it took me a little while to figure out that the greatest value I was going to be able to add in the world was using the skills that had made me successful in business."²

What also soon became clear was that the foundation needed to shift to a proactive grant-making model. "The first significant turning point was when we realized we were being inundated with requests and it was hard to say no," said Jean. "So first, the most important step was to not accept unsolicited grant proposals. That allowed us to move from being reactive to proactive."

CITIZEN PHILANTHROPY: GIVING DONORS A VOICE

One of the Case Foundation's most important philanthropic innovations was its open grant-making approach, which the foundation called "citizen-centered philanthropy." This model used the web to enable any individual to play a role in shaping the foundation's grant-making strategies by engaging directly with the foundation online.

In developing the citizen-centered philanthropy concept, Jean's corporate experience played a key role. With a marketing background, focus group experience, and other consumer research techniques, she had been struck by how, in the social change world, little dialogue existed between those delivering services and those needing services.

The foundation also drew heavily on research it had published in a 2006 paper called "Citizens at the Center: A New Approach to Civic Engagement." The research found that individuals often felt disconnected from public leaders and civil society organizations. It concluded that, rather than simply signing up for official programs or helping fund established campaigns, individuals needed to join forces and work together to effectively solve problems and improve lives in their communities.

The foundation therefore devised a competition called the Make It Your Own Awards, which it launched in 2007. The foundation designed the contest to involve as many people as possible, including many individuals who might have never previously participated in social change initiatives. In the competition, individuals or small organizations could submit their ideas for philanthropic projects via the foundation's website.

² Interview with Jean Case, CEO and cofounder, The Case Foundation, August 19, 2014. Subsequent unattributed quotes of Jean Case in this case are from this interview.

All applicants were given an online tool called a “widget” that could be used like an online advertising banner to raise awareness and funds for their project. Each applicant produced a personalized webpage where they could post information about their application, a project diary, photos and videos, and additional comments. Each applicant’s widget was also used to track his or her individual fundraising efforts, to make a donation, and to copy the widget to their own website, where others could access it.³

Participants in the competition tackled diverse social issues. For example, Dilkhwaz Ahmed, a San Diego-based Iraqi refugee who was one of the 100 semi-finalists, wanted to help women from immigrant communities address violence and injustice by creating a center where the women could talk about the problems they face in a safe space.⁴ By contrast, Jim Barrett—one of the top 20 finalists—ran an organization called In Search of the Commons. Located on the edge of Yellowstone National Park, it worked to engage the community in debates about the balance between development and preservation.⁵

The Make it Your Own Awards used an approach to social innovation known as “crowdsourcing.” Crowdsourced innovation is the process of seeking knowledge and ideas externally, from anyone, anywhere, often using web-based technology. It was an approach that had also been used by, for example, the online encyclopedia Wikipedia and the collaborative design platform OpenIDEO. In the corporate world too, companies were tapping into crowdsourcing for external sources of innovation. Among them was Procter & Gamble, which used its Connect + Develop portal to solicit business ideas and technologies that addressed the company’s needs based on descriptions posted on the website.

The Make It Your Own Awards launched in June 2007 and received almost 5,000 entries (the foundation had originally anticipated about 1,000). The 100 quarter-finalists each received \$100 to help them start working on their idea, while the 20 semi-finalists each received a \$10,000 grant.

The foundation then took the concept of citizen-centered philanthropy a step further by using an online voting system to choose the four finalists, giving citizens the ultimate say in whose ideas would be selected and funded at the \$25,000 level.

The competition did more than help individuals to champion the causes they cared about. It changed the grant-making process. While in the past, individuals wanting to effect social change might have had to submit a proposal for assessment via a lengthy paper-based process, now they could do this quickly and easily online. More importantly, the Make it Your Own Awards opened up opportunities not only to small organizations and groups but also to individuals who might never before have considered participating in social change. To solicit a diverse pool of

³ “Case Foundation Launches Make It Your Own Awards to Recognize Innovative Models for Civic Engagement,” Case Foundation press release, June 26, 2007.

⁴ Sarah Murray, “Networking for the benefit of others,” *Financial Times*, November 2, 2007.

⁵ Case Foundation flyer:

<http://casefoundation.org/sites/default/files/In%20Search%20of%20the%20Commons%20Flyer.pdf> (November 5, 2014).

applications, the foundation devised a marketing plan to publicize the competition widely through more than 200 outreach partners, including online publications such as Black Planet, Asian Avenue, Mi Gente, and GOOD Magazine. As a result, more than one-half of those surveyed said they had never completed an online grant application before. In this respect, the awards represented a radical break with the philanthropic tradition.

TECHNOLOGY: A CRITICAL PHILANTHROPIC TOOL

The Make It Your Own Awards would not have been possible without the Internet. And while the foundation's grant making did focus on using technology from the outset, the Internet had also become an operational tool, making possible many other approaches to bringing about social change, such as the crowdsourcing of ideas and the hosting of online competitions. Technology also allowed the foundation to advance an important goal—increasing transparency. The Cases believed that sharing lessons from both successes and failures was important for speeding up the process of collective learning and helping others in the social sector gain insights that could increase their impact.

“Technology was a core focus for us from the start,” said Jean. “We didn’t really know who or what we needed to be in the world of philanthropy, but one thing we did know was that we had a network and resources around technology that could make a difference.”

The way the foundation used technology evolved rapidly. While its efforts to bridge the digital divide through the PowerUp initiative looked more like traditional social investment, the Make It Your Own Awards opened up giving to anyone who wanted to participate by using the web to both solicit ideas and engage individuals in choosing which of those ideas should receive a grant. It was an early example of a foundation giving the public a direct role in deciding who should be awarded some of its money. The foundation believed that often citizens knew what worked best in their communities and could identify or develop the most appropriate solutions to social problems.

The foundation also deployed technology as a social change vehicle when it created America's Giving Challenge. In this initiative, the foundation used social media to award \$750,000 in charitable grants. To run the challenge, the Case Foundation—which provided the initial grant money, with matching funds from the W.K. Kellogg Foundation—worked in partnership with Facebook's Causes site and PARADE Publications.

The foundation designed the competition, which ran on Facebook from December 2007 to January 2008, to encourage individuals and nonprofits to use their social networks, both online and offline, to raise money and attract new supporters for their causes. The foundation ran the challenge again in 2009 between October 7 and November 6.

The idea behind America's Giving Challenge was to promote the use of social media for social good and demonstrate, to the broader philanthropic community, social networking's potential as a tool to raise funds and awareness for philanthropic causes. The Cases recognized that social media, by connecting individuals and causes, enabled them to reach new donors outside of the traditional philanthropic community. In addition, the foundation used technology to do more

than simply raise awareness for causes by challenging them to participate in online competitions and idea sharing.⁶

For example, another innovation in America's Giving Challenge was that participants competed for daily and overall awards based on the number of donations to their cause, not dollars raised (donations started from just \$10).⁷ In this way, the challenge promoted the idea that, through the power of technology, small donations generated from large numbers of people could both add up to significant philanthropic funds and create new advocates who might continue to support the organization into the future.⁸

Internally, too, technology was becoming critical to the foundation's activities, underpinning its citizen philanthropy initiatives, creating giving platforms, and allowing it to promote transparency and open communications with its stakeholders. However, surprisingly—particularly for an organization founded by two individuals so deeply immersed in technology—the foundation did not have a website until 2005.

This was because of Jean's concerns about both ego-centric "bragging" by broadcasting the foundation's activities online and the organization's capacity to be responsive to individuals and groups that approached it via the website. However, many grantees pointed out that if the Case Foundation publicized its support for them, it would help signal other funders to consider supporting them too.

Soon after, the web became fundamental to Jean and Steve's approach to transparency and knowledge sharing. "The website was their first foray into being more public about what they were doing," said Allie Burns, the Case Foundation's senior vice-president of communications and marketing.⁹

It was through America's Giving Challenge that the Case Foundation took another significant step forward in transparency. "We made a commitment with America's Giving Challenge to publish whatever came of it even before we went into the campaign," said Jean. "That was an important moment for us because it held our feet to the fire and we said, 'If this thing falls on its face, we have to let the world know.'"

BUSINESS AND SOCIETY: CROSS-SECTOR APPROACHES TO IMPACT

Steve and Jean Case were not only grounded in the world of technology, but also they understood the workings of the private sector as a whole. "We've always been big believers that

⁶ In fact, research would later emerge that online gestures of support such as Facebook 'likes' did not necessarily lead to real-world actions. Kirk Kristofferson, Katherine White, and John Peloza, "Observability of an Initial Act of Token Support Affects Subsequent Prosocial Action," *Journal of Consumer Research*, Vol. 40, No. 6, April 2014.

⁷ "About the Giving Challenge," Case Foundation website: <http://casefoundation.org/content/about-challenge> (October 13, 2013).

⁸ "America's Giving Challenge," Case Foundation website: <http://casefoundation.org/projects/giving-challenge> (October 13, 2014).

⁹ Interview with Allie Burns, senior vice-president of communications and marketing at the Case Foundation July 31, 2014. Subsequent unattributed quotes of Allie Burns in this case are from this interview.

business is a powerful tool,” said Jean. “A lot of innovation will come from business that might not come out of other sectors, so we need business at the table as we look for solutions.”

From the outset, the foundation worked to include the private sector in its programs. For example, the PowerUp program engaged for-profit corporate partners along with philanthropic players and nonprofit partners.

Later, in 2007, the U.S. Palestinian Partnership (UPP), for which Jean served as co-chair,¹⁰ took a similar approach, applying business techniques to social challenges by launching a venture capital fund targeting Palestinian companies. Launched in 2007 by then U.S. president George W. Bush, the U.S. Secretary of State, and several American businesses, the UPP was collaboratively designed to create economic investment and educational opportunities for young Palestinians to advance peace and prosperity in the region.

As well as gaining support from institutions such as the Palestine Investment Conference, the Palestinian Business and Investment Forum, and youth centers in the West Bank, the partnership attracted large financial and in-kind (contributions of services and expertise, rather than money) donations from the United States agency for International Development (USAID) and companies including Cisco, Intel, Microsoft, and Google.

In 2011, the Case Foundation brought together public and private sector players—from large corporations, advisors, and funders to service providers and mentors—through the Startup America Partnership. Launched at the White House, the initiative received cofunding from the Kauffman Foundation, whose research showed that emerging enterprises—established within five years or less—were responsible for all net job creation in the past 30 years (more than 40 million jobs). Informed by this research, the partnership was designed to help accelerate the growth of high-impact entrepreneurs who could contribute to economic growth and employment in the United States.

When it came to identifying appropriate private sectors partners, the foundation’s approach evolved over time. In the early days, it had taken advantage of its own network. Later, it started taking a more active approach to seeking out potentially productive collaborations by having a staff member dedicated to partnerships. Eventually, it built a team with expertise in business development, marketing, technology, and corporate partnerships.

The Case Foundation also developed a focus on models of social change that harnessed the power of business and capital markets:

- **Social enterprise:** Social entrepreneurs act as change agents for society—seizing opportunities to improve systems, invent new approaches, and create sustainable solutions to social problems. They include individuals and enterprises that apply business models as a means of developing solutions to social or environmental challenges. They create both for-profit and nonprofit organizations.

¹⁰ Jean Case, Case Foundation website: <http://casefoundation.org/profile/jean-case/> (May 20, 2015).

- Impact investing: Impact investments are monetary investments that deliver social and environmental, as well as financial returns by actively placing capital in organizations (often social enterprises) whose purpose is to generate social or environmental goods, services, or other ancillary benefits. Expected financial returns range from the highly concessionary to above market.
- Building impact investing infrastructure: In March 2015, the Case Foundation entered a partnership with B Lab, the nonprofit behind the B Corp certification (which verifies that a company is focusing on social and environmental impact as well as profits) to develop online assessment tools to help companies compare and improve their impact.¹¹

The foundation's strategy in these areas was to make grants and investments that supported enterprises using market-based models. It also supported the development of the infrastructure necessary for this market to expand and to attract greater numbers of investors.¹² This infrastructure ranged from measurement tools and reporting standards, which can assess the social or environmental impact of an investment, to legal structures such as benefit corporations, which are new legal entities that can give the pursuit of social and environmental impact the same legal protection as making financial returns for shareholders.

Like the foundation's work to build cross-sector partnerships, the focus on social enterprise and impact investing stemmed from the Cases' belief that harnessing the power of business was a means of doing more with philanthropic dollars. At the same time, they saw that more and more investors—both individuals and institutions—wanted to use their investment capital to reflect their values and play a role in changing lives and conserving the planet's resources.

They also recognized that government, philanthropy, and nonprofits could not solve the world's biggest challenges alone and that the private sector was an essential player in making social and economic progress. Jean liked to compare this phenomenon to rowing teams on a river. If a boat had empty seats, it would not move forward as fast as one with all the seats full. She said: "As we have entrepreneurs and companies focused on these areas along with others, suddenly we have all the seats filled and the boat is going down the river farther and faster as a result."

EXPERIMENTATION: THE INNOVATOR'S APPROACH

The fact that Jean and Steve wanted to give away the bulk of their wealth during their lifetime significantly influenced their approach to experimentation and risk-taking. It also gave them a strong belief in the importance of sharing knowledge about failures as well as successes.

The foundation demonstrated this principle in the wake of an unsuccessful program called PlayPumps that was designed to bring clean drinking water to Africa. In 2006, the initiative was announced at the Clinton Global Initiative, an annual meeting in New York convened by former U.S. president Bill Clinton. With \$16.4 million from U.S. government agencies, the Case

¹¹ Measure What Matters: Announcing a New Partnership Between the Case Foundation and B Lab, Case Foundation website, March 23, 2015: <http://casefoundation.org/blog/measure-what-matters/> (May 20, 2015).

¹² Jean Case, "Impact Investing: \$1.5 Billion in Commitments and a New Resource for Policymakers," *Huffington Post*, June 25, 2014.

Foundation and the MCJ Foundation, the program funded specially designed playground equipment that used the force children generated when playing on the equipment to power an underground water pump.¹³

The problem was that in practice, not enough children were playing on the pump equipment. Moreover, an advertising model designed to create operational revenue did not generate the anticipated funds and when equipment broke, it could not be fixed. After seeking ways to amend the model, the foundation realized that it needed to rethink its approach. In May 2009, the PlayPumps International-U.S. board appointed a new CEO and made a grant of funds and technology to Water For People, a nonprofit whose mission was to provide universal access to clean water. Subsequently, PlayPumps became one of a portfolio of solutions from which rural African communities could choose. Meanwhile, the Case Foundation also made an investment in Water For People.¹⁴

In May 2010, Jean Case wrote a blog post entitled: “The painful acknowledgement of coming up short,”¹⁵ (**Exhibit 2**) in which she talked about the lessons from the PlayPumps investment. It was widely read and acknowledged by many as demonstrating the foundation’s readiness to be transparent about both what had worked and what had not worked. “People thanked us for being honest,” said Burns. “It was an opportunity to tell the story in Jean’s words.”

In 2013, building on what the foundation had learned in the reaction to the blog post, it started hosting “Liquid Courage” gatherings, bringing people together in informal meetings over wine and beer to discuss and learn from failures.

This reflected the foundation’s desire to engage in rapid iteration and learning, both internally and externally, by encouraging others to take similar approaches.

BE FEARLESS: A NEW APPROACH TO SOCIAL INNOVATION

The “Liquid Courage” sessions were part of an initiative called the Be Fearless Campaign that was launched in 2012 to both further develop the foundation’s approach to innovation and encourage more risk taking in the wider foundation and nonprofit world. The campaign was built on the foundation’s belief that, in the absence of market forces such as customers and competitors, philanthropists and the social sector needed new mechanisms with which to disrupt the status quo. These included partnerships, peer-to-peer accountability, and the ability to fail while advancing workable solutions to global challenges.

Starting as a communications initiative, the campaign created a framework for how the foundation pursued innovation. First, this involved some soul-searching. At the time, the

¹³ Deepti Hajela, “Branson to pledge billions at Clinton Global Initiative,” The Associated Press State & Local Wire, September 21, 2006: <http://re.clintonfoundation.org/page.aspx?pid=725> (October 14, 2014).

¹⁴ “Water For People Announces Investment from Case Foundation to Expand Sustainable Safe Water Solutions in Africa,” Case Foundation Press release, October 27, 2009: <http://www.casefoundation.org/pressroom/releases/water-for-people-announces-investment-case-foundation-safe-water-solutions-africa> (October 19, 2014).

¹⁵ Jean Case, “The painful acknowledgement of coming up short,” May 4, 2010, Case Foundation website: <http://casefoundation.org/blog/painful-acknowledgement-coming-short> (October 19, 2014).

foundation was approaching its fifteenth anniversary, which seemed an appropriate moment to take stock. “We were a little different from the average grant-making foundation that has programmatic elements, but we were in a unique space and we were struggling with describing who we were and what we did,” explained Burns. “So we got some outside help to understand what made us tick.”

With the help of external consultants, the foundation spent time defining what it meant to “Be Fearless.” And in a report published in May 2012, an introduction written by Jean set out the concept: “To us, being fearless means setting audacious goals, acting urgently and boldly, being unafraid of risk, being willing to strike unlikely alliances, and accepting the possibility of failure while still pressing forward.”

The Case Foundation saw the Be Fearless campaign as a means of reinforcing internally its bold, innovative approach to philanthropy and social change. “As we reflected, this constant theme kept coming up, which was looking at the behaviors that we had executed ourselves or we’d encouraged from our grantees or partners,” said Erich Broksas, senior vice-president of strategy and international investment at the Case Foundation.¹⁶

However, as well as giving the foundation a tool on which to reflect and strengthen its approaches internally, the Be Fearless campaign also had an important external objective—encouraging the entire sector to become bolder, more collaborative, more accountable, and less afraid of failure when promoting social innovation. “Failure is a badge of honor in the start-up space, but everyone hides it and won’t talk about it in philanthropy,” explained Broksas. “We wanted to help foundations take more risk and allow their nonprofits to be more bold.”

Part of the external approach involved holding events at conferences, forums, and “Liquid Courage” sessions. In addition, building on its experience of the Make It Your Own Awards’ citizen philanthropy, it launched a 2012 Finding Fearless competition, which it ran on a technology platform that was developed in-house. The idea was to identify undiscovered social innovators from across the United States and, with its partners—Microsoft, REI Adventures (a travel company), and the Goldhirsh Foundation—give away up to \$670,000 in grants and prizes.

In the competition, individuals could nominate themselves or someone else for an existing social change project that had the potential to expand. A team of 75 judges selected from the submissions and winners each received a grant of either \$10,000 or \$1,500. The public had the opportunity to vote for the projects that should receive \$10,000 in additional grants and other prizes.

While the competition had the same element of citizen involvement as the Make It Your Own Awards—with the public voting on the entries—selecting the winners for this competition proved more challenging. “It was a very interesting learning experience,” said Burns. “It was realizing that we had these great principles and ideas, but when you’re looking at someone developing a community solution it’s hard to decide if this is fearless or not.”

¹⁶ Interview with Erich Broksas, senior vice-president of strategy and international investment at the Case Foundation, July 18, 2014. Subsequent unattributed quotes of Erich Broksas in this case are from this interview.

However, to create a strong direction for meetings, events, and the Finding Fearless competition, the Be Fearless campaign developed five core tenets:

- Make Big Bets: Set audacious not incremental goals.
- Experiment Early and Often: Don't be afraid to go first.
- Make Failure Matter: Failure teaches. Learn from it.
- Reach Beyond Your Bubble: It's comfortable to go it alone. But innovation happens at intersections.
- Let Urgency Conquer Fear: Don't overthink and overanalyze.

The Case Foundation did not envisage these principles as “rules,” but rather a set of characteristics that could help individuals and organizations identify moments when decisions were being made fearlessly. To illustrate these, the 2012 report highlighted examples of organizations that had applied these principles to their activities, from companies such as Apple and Southwest Airlines, to the United Nations' Nothing But Nets malaria eradication campaign. “We wanted to speak to people in a plain language that they understood that would also be inspirational and motivational,” said Broksas.


















Both internally and externally, the Be Fearless campaign provided a way for the Case Foundation to reflect on its approach to experimentation, to keep pace with new challenges in the social sector, and to accelerate the pace of innovation both internally and externally. “If you're going to innovate you have to take risks and if you innovate, you may fail,” said Jean. “So you have to go into it accepting that failure may be an option.”

CASE QUESTIONS FOR STUDENTS

- How did the Cases' apply the thinking they had developed through their careers in business and technology to address social challenges?
- How has the Case Foundation pursued each of the following strategies in its philanthropy?
 - Citizen philanthropy
 - Innovative uses of technology
 - Public-private partnerships
 - Social entrepreneurship and impact investing
- How did the Be Fearless campaign reflect and build on the activities and strategies that the Case Foundation had pursued since its inception?

Exhibit 1 Make It Your Own Awards™ Commons Flyer

Make It Your Own Awards Top 20

	Child/Youth Friendly City Nancy Gilder Denver, CO
	Citizen Participation Keith Twitchell New Orleans, LA
	Community Conversations Kate McPherson Vancouver, WA
	Community Vision Project Imre Kepes Pelham, MA
	Conversations for Change Lisa Harper New York, NY
	Crossing Borders Nan Kari St. Paul, MN
	DCCV Bridget Murphy Menomonie, WI
	Deliberative Democracy Mark Shoul Royalston, MA
	Five Two Eight O Janna Goodwin Denver, CO
	Front Porch Forum Michael Wood-Lewis Burlington, VT
	In Search of the Commons Jim Barrett Livingston, MT
	Juveniles 4 Justice (J4J) Jessica Feierman Philadelphia, PA
	Leaders of the New School Asad Jafri Chicago, IL
	Madison SOS Natalia Thompson Madison, WI
	Making Health Our Own Susan Sloan Bellingham, WA
	My School is Your School Dominick Maldonado New Haven, CT
	Re-Imagining Our City Fiona Cheong Pittsburgh, PA
	Summit for Environmental Action Kate Irwin Sarasota, FL
	UNCommon Council Keith Herring Syracuse, NY
	Wilson For The Ages David Criswell Wilson, KS



Help our community get
\$25,000—with just a few
clicks of your mouse!

Vote today for
**In Search of
the Commons**

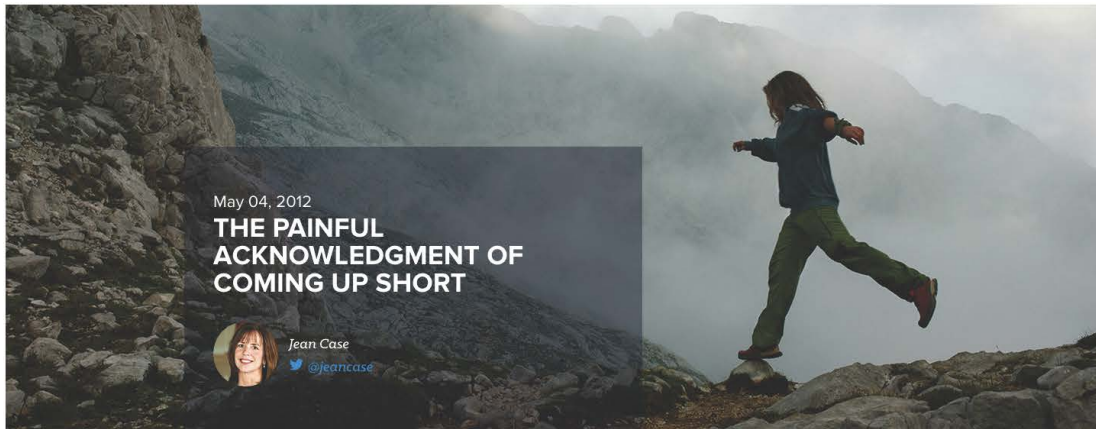
The community of Livingston, which is located on the northern border of Yellowstone National Park, has long been witness to the conflicting interests of developers and preservationists. In Search of the Commons aims to engage the entire community—through group gatherings and a new Web site—in the discussion of shared beliefs and a vision for the future. Special effort will be made to bring together the young and old via cross-generational interviews.

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casefoundation.org/myvote

THE CASE FOUNDATION

Exhibit 2 Make It Your Own Awards™ Commons Flyer



“So, what do we do next?” According to reports, that is the response Bill Gates offered upon learning that the Gates Foundation’s \$700 million polio effort had fallen short of stopping the disease from spreading throughout Africa. Indeed, instead of putting a once-and-for-all stop to the disease, an outbreak had struck and was spreading through some of the very countries targeted for eradication. At the moment I read his response, I felt his pain. Imagine putting up such a significant sum from the goodness of your heart, committing your time, the talent of people you admire and respect and putting yourself out there in a really big way to meet a really big challenge and then ... learning it didn’t exactly work the way you’d planned for and the way you passionately hoped it would.

When I say I get this, I really get this. On a dramatically smaller scale, at the Case Foundation we’ve had to face our own hard moments when reality has set in and you realize that the big opportunity you were chasing is looking more like a really big challenge that is hard to overcome. Things don’t materialize as envisioned, and you fall short of your mark. It’s easy to feel discouraged or even embarrassed. You can’t help but worry about what people will think, or the price you might pay in the court of public opinion.

We experienced this recently, as we had to re-think our involvement in the PlayPumps initiative, which brings clean drinking water to rural African villages. When we were first introduced to the technology, we believed both the technology and the business model for its deployment had enormous potential and jumped in with both feet to help create PlayPumps International-U.S. as a US-based fundraising and marketing organization to support the initiative. As we’ve noted in the past, we’re proud of the successes the initiative has had – PlayPumps are now bringing play opportunities and improved access to safe water in hundreds of communities and schools in Africa. In addition, these efforts have helped spark a number of new play-related technologies

now being offered by various organizations and the initiative has highlighted the important role that social entrepreneurship can play in global development. However, we also acknowledge that the organization has fallen short of the aggressive goals that were developed at the outset, and all involved have learned many lessons.

As I noted last fall, we learned that doing work on the ground in Africa is hard and humbling work, even more so than anticipated. We learned that PlayPumps perform best in certain community settings, such as at large primary schools, but they are not necessarily the right solution for other communities. And more broadly, we learned that however creative PlayPumps might be, they really are just one element in a larger portfolio of possible solutions that can be tailored to meet the safe water needs of specific rural communities. In addition, while there have been successes in implementing the PlayPumps technology, and we believe in the entrepreneurial approach of the PlayPumps model, a combination of factors made execution of the original model we envisioned when creating PlayPumps International-U.S. a significant challenge.

Of course, there really is only one appropriate response when things aren't humming along as planned, and it is the same response Bill Gates offered, "So, what do we do next?" Because just like in business ventures, personal undertakings and public sector initiatives, things often go wrong. The unexpected happens. Reality doesn't always play out like the business plan calls for. Look at any great business today and chances are their road to success was fraught with potholes – low moments that required fresh, new thinking and important course corrections. As a nation, I think we've learned that progress comes through trial and error, and much of what we enjoy today is because somebody somewhere was willing to blaze new ground.

In the case of PlayPumps, there were essentially three options. One was to stay the course, ignore the emerging realities, and stubbornly continue on a path that the growing evidence was suggesting was unwise. A second would be to pull the plug on the effort, and conclude that the time and capital was better invested elsewhere. And the third was to take a step back and regroup, and undertake efforts to go forward in a new and more effective way. For PlayPumps International-U.S., the third path was the right one. The belief that clean water was one of the great issues of our time hadn't changed – but there were likely better ways to advance the initiative. In May 2009, the board of PlayPumps International-U.S. brought in a new CEO to identify a new path forward. Under his leadership, in October of last year, the organization announced a grant of funds and technology to Water For People, which now offers PlayPumps as part of a larger portfolio of solutions from which rural African communities can choose. At the same time, we announced an investment by the Case

Foundation in Water For People to help the organization accelerate and expand its efforts in Africa. For nearly 20 years, Water For People has pioneered innovative approaches to safe water supply, empowering communities and utilizing local entrepreneurs for sustainable operations and maintenance, and we truly believe that their approach represents a step forward for the PlayPumps technology.

It sometimes feels like philanthropic efforts are held to a different standard than in the private or public sectors. All too often there is less tolerance for mistakes, which leads many organizations to become risk-averse. And when mistakes are made, the tendency is to sweep them under the carpet – thus depriving the sector of important lessons learned. But in reality, the very nature of innovation requires that we try new things and take risks. Sometimes they will work, other times they won't – but in all cases, we should learn from our experiences and strive to do even better in the future. Of course we would have liked PlayPumps to have achieved the reach and impact to date that we originally envisioned – it's much more fun to talk about successes than disappointments. The bottom line is that hundreds of African communities now have greater access to clean water and the revised efforts working with Water for People will further improve its availability. Together with other sector efforts and replication of the concept, we do believe African communities will be better served and the interventions more sustainable because of the important course corrections we've put in place. Might we have to revisit the strategy again and adapt along the way? Maybe. Turns out innovating is hard work anywhere and anytime. In the developing world even more so. But if the philanthropic sector is transparent about mistakes and lessons along the way, and adapts as the situation calls for, hopefully we'll all end up a little wiser and a little closer to solutions that can more effectively address the daunting challenges of our day.

Source: Jean Case, "The painful acknowledgement of coming up short," May 4, 2010, Case Foundation website: <http://casefoundation.org/blog/painful-acknowledgement-coming-short> (October 19, 2014).