

HARVEST TIME
for THE ATLANTIC
PHILANTHROPIES

2017 — 2019:
Three Endings and a Beginning

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FOREWORD & ACKNOWLEDGMENTS

THIS IS THE LAST IN A SERIES OF SEVEN REPORTS chronicling the concluding years of The Atlantic Philanthropies, which is set to become the largest endowed institution thus far to put all its charitable assets to use in a fixed period and then close its doors. The series has been produced with support from Atlantic, but it is the result of independent research and analysis. The opinions and interpretations presented here are those of the author alone. The pages that follow cover events from the beginning of 2017 through the autumn of 2019, roughly one year before Atlantic expects to complete its work and close.

In 2002, almost exactly 20 years after Atlantic was founded, the Board formally declared that the institution would commit all its assets — which would eventually total some \$8 billion — by the end of 2016, well within the expected lifetime of its founder, entrepreneur Charles F. Feeney. That goal was achieved on schedule, although some grant commitments are still awaiting the fulfillment of final requirements before the full amount is disbursed.

Because of its limited life, Atlantic has been able to make grants each year in aggregate amounts considerably larger than would have been possible if it were preserving a perpetual endowment. For example, although its total assets in 2012 would barely have ranked among the 30 largest American foundations, its pace of annual giving had put it well within the top 20. The scale and significance of Atlantic's time-limited operation — and the complexities and opportunities it has encountered along the way — are the primary reason for chronicling the events of its final years.

INFORMATION IN THIS REPORT is drawn from three main sources. The first is a review of Atlantic's written records, including strategy papers, staff memoranda, Board minutes, and docket books, and in some cases research reports produced outside of Atlantic. These documents are cited individually in footnotes, as are other citations as appropriate.

The second major source of information is a series of interviews conducted throughout 2016 and 2017 with a selection of Atlantic staff, grantees, consultants, and Board members. To encourage candor, most interviews were conducted on the condition that the respondents would not be quoted by name. As a result, excerpts from the interviews are not footnoted. In some cases, where knowing the source of a comment is essential for understanding its meaning, interviewees gave permission to use their names.

Third, data on individual grants or clusters of grants have been drawn from Atlantic's electronic grants management database. Chief Financial Officer David Walsh also provided invaluable financial data, analysis, and commentary.

Abundant thanks are due to every Atlantic employee and consultant who, throughout the production of this series of reports, participated in interviews, foraged for documents, answered questions, checked facts, and patiently filled in gaps in information or perspective. They are too numerous to name individually, yet they have been too generous to deserve merely a collective acknowledgment. For that injustice, and for any errors or omissions in this document, the author bears sole responsibility. ■

SUMMARY

THE FINALE FOR THE ATLANTIC PHILANTHROPIES, the time-limited group of charitable institutions founded in 1984 by entrepreneur Charles F. Feeney, came in three stages that collectively lasted seven years. Although Atlantic had long ago committed itself to distributing all its assets — ultimately totaling more than \$8 billion — and closing its doors in 2020, it had operated for much of its history mostly the way a perpetual foundation would: It ran ambitious, sustained grantmaking programs (ultimately centered on children, health, aging, and human rights) spanning eight countries on five continents, each governed by its own complex, multiyear strategy.

In 2002, the Foundation decided to limit its life, make its final grant commitments by 2016, and close in 2020. With that decision, Atlantic then narrowed its focus to areas where it could make the greatest difference in its remaining 18 years. Only in 2012 did the Foundation turn its attention in earnest to concluding its work, and from there, the end began to unfold in three phases. First, Atlantic made a flurry of final grants and wound down its relationship with hundreds of grantees worldwide. Second came a burst of mostly large, one-time grants aimed at big, concluding goals — primarily opportunities that had surfaced from Atlantic's earlier grantmaking.

THE THIRD AND FINAL PHASE began in 2015, with the creation of the Atlantic Fellows, a nearly \$700 million global network of seven fellowship programs designed to help outstanding leaders advance “fairer, healthier, more inclusive societies.” The seven programs, each based at a host institution, are officially known as **THE ATLANTIC FELLOWS FOR:**

- **EQUITY IN BRAIN HEALTH**, at the Global Brain Health Institute;
- **HEALTH EQUITY: SOUTHEAST ASIA**, at the Equity Initiative;
- **HEALTH EQUITY: SOUTH AFRICA**, at Tekano, a new nonprofit organization established with Atlantic support;
- **SOCIAL EQUITY**, at the University of Melbourne;
- **RACIAL EQUITY**, at Columbia University in New York and the Nelson Mandela Foundation in Johannesburg;
- **SOCIAL AND ECONOMIC EQUITY**, at the London School of Economics’ International Inequalities Institute; and
- **HEALTH EQUITY: U.S. AND GLOBAL** at George Washington University’s Fitzhugh Mullan Institute for Health Workforce Equity.

The seven are linked by a central hub and resource center called **THE ATLANTIC INSTITUTE**, based at the Rhodes Trust at the University of Oxford.

Each program had begun with a one- to two-year planning stage, followed by a three-year “incubation” or pilot run, after which Atlantic would make a final determination about long-term funding. One by one, the programs that successfully weathered the incubation would receive eight- or nine-figure sums intended to keep them in operation for 10 to 15 years. The Foundation’s final decisions about each program’s long-term funding were staggered over a few years, so that the programs that started earliest (the first two on the list) would be the earliest to launch with sustaining grants. As this is written, some are still awaiting final decisions.

The Atlantic Fellows is a nearly \$700 million global network of seven fellowship programs designed to help outstanding leaders advance “fairer, healthier, more inclusive societies.”

THE ENORMOUS CHALLENGE of conceiving, organizing, staffing, piloting, refining, and launching all these programs — a process that some close observers thought would normally take seven years or more — had to be accomplished in just four years, given the Foundation’s determination to wrap up its work in 2020. To complicate matters further, Atlantic was not content just to produce seven distinguished programs; it wanted them to be integrated into a cohesive worldwide network that links the fellowships and their participants “across all disciplines and borders and provides a lifelong resource for collaboration among all Atlantic Fellows.” The network needed to be a fertile meeting place for people of different backgrounds and specialties, where interpersonal connections might lead to collaborative projects or new ways of thinking and tackling challenges. To manage this network, Atlantic envisioned a hub institution active and creative enough to be a genuine resource to all the fellowships without intruding on their distinctive activities and cultures.

Thus, the creation and development of the Atlantic Institute. Defining the Institute’s role and activities, organizing its leadership and staffing, and developing communication channels among all the constituent organizations represented an additional layer of effort, not only for Atlantic and Rhodes, the Institute’s host, but also for the seven programs whose missions the Institute was meant to serve and connect. Clarifying the scope and mission of the Atlantic Institute was complicated in part because of a simmering question that had surfaced often in discussions among leaders of the seven fellowship programs: What are the unifying ideas that will bind these different kinds of leaders, in their various fields and disciplines, into a global whole? What common qualities will they share, and what cohering vision would lead to interaction and cross-pollination among them?

The Foundation set out to answer these questions in writing, in a 2018 statement that ultimately became the preamble to each program’s founding document. Atlantic’s preamble described the vision and theory of change underlying the fellowships and crystallized the core purpose of the fellowship network. Its central thesis contained the rationale for drawing the far-flung assortment of disciplines, countries, missions, and cultures into a single worldwide community:

Advancing fairer, healthier, more inclusive societies requires values-based, solutions-oriented, and influential people — who are culturally and professionally diverse — to learn from one another and collaborate on solutions. The problems that the Atlantic Fellows seek to address are complex and systemic in nature and larger than any one person, community, or nation can effectively address alone or in the short-term.

BUILDING ON THE PREAMBLE, each program drew up a detailed Charter that laid out its own particular vision, mission, governance, finances, and set of objectives that would guide its work. It detailed how Fellows would be recruited “from a range of backgrounds, professions, disciplines, and life experiences,” and what kinds of opportunities should be provided for them (such as “content and experiences that stimulate critical analysis and debate which is inclusive and productive, including perspectives that might challenge Fellows’ current beliefs”). But even amid this catalogue of particulars, tailored for each individual program, the overarching imperative of a “global community” gathered around a “shared mission” rang through almost every paragraph.

The Charters amounted, in effect, to a written commitment to be faithful to the vision with which the programs were founded. Nonetheless, these documents were meant mainly as a way of clarifying intentions and concentrating effort, rather than as an enforcement mechanism. For Atlantic, an institution that will have ceased to exist by the time even the oldest fellowship program reaches its fourth birthday, policing the programs’ evolution over time would be all but impossible. Instead, the Foundation’s confidence that the programs will adhere to their founding missions was based not on any coercive effect of the Charters, but on the essential nature of the programs, their host institutions, and the leaders and Fellows themselves: people and organizations dedicated to equitable social change, to learning and collaboration, and, as time goes on, to the nurture of a cadre of lifelong Fellows who can carry the vision forward.

Underlying that expectation, the Atlantic Institute is also meant to exert a gravitational pull, a cohesive and clarifying force — though it will be a soft one, based on convening, enriching, and connecting, not governing. Striking that soft balance between creating a community and respecting diversity, in a way that appealed to all the participating programs without threatening their independence and distinctiveness, took many months of negotiation. Several programs were uncertain, at first, how a central organization based (in some cases) a continent away could provide real benefits to them without interfering in their work. But a pair of global meetings in 2018 — one of Fellows, the other of program directors — provided a kind of breakthrough in this trust-building process, achieving both a clarity about roles and a sense of possibility that had been inchoate until then. One participant described the meetings as providing “a transition from wary skepticism to deep appreciation and engagement.”

IN OCTOBER 2018, the Atlantic Fellows program for Health Equity in Southeast Asia became the first to complete its incubation and receive its independence. The Brain Health fellowship was approved and funded in June 2019, and the Atlantic Institute and the program for Health Equity at George Washington University were both approved four months later. In March 2020, the Board is scheduled to decide on the Social and Economic Equity program at the London School of Economics. A last round of decisions is to follow in June for the remaining fellowship programs: on Racial Equity, on Health Equity in South Africa, and on Social Equity at the University of Melbourne. (Some votes may occur earlier than scheduled, if circumstances warrant.)

Meanwhile, the Foundation has made a concentrated effort to enshrine its 35 years of experiences, ideas, and lessons in a website that will survive Atlantic, at least for several years. The site, which links to the Atlantic Archives, is intended to serve what appears to be a continuing interest in reports on the programs, strategies, methods, and country-by-country experiences that make up the Foundation's history. Formal responsibility for maintaining and updating the site passed in 2018 to Cornell University, where the Atlantic Archives are now housed in the university library. The process of collecting, sorting, cataloguing, digitizing, and preparing documents to be made public began in 2017 and is still underway as this report is finalized, though parts of the collection are opening to the public. Access to digitized records is available through the website, AtlanticPhilanthropies.org, and through the Digital Repository of Ireland, the online treasury of Irish social and cultural heritage.

By late 2019, the efforts of Atlantic's staff and Board had narrowed to three principal areas of work: completing and launching the Atlantic Fellows programs and the Atlantic Institute; distributing the last set of publications and finalizing the archives and website for future researchers; and closing out the last of the Foundation's earlier grants, some of which still had final matching requirements or other conditions to satisfy. All those tasks are scheduled to be completed by late 2020, at which point the Board will meet in San Francisco with Chuck Feeney to commence the liquidation of The Atlantic Philanthropies. Board members will convene once more at the end of the year to confirm the final resolutions dissolving the Foundation. Cornell will then post a notice on the Atlantic website confirming that the institution is no more.

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THEREAFTER, the question of Atlantic’s enduring legacy will have to await the slow judgment of history. Consistently, over the years, the Foundation’s Board and executives have avoided the unanswerable, and ultimately distracting, questions of how the Foundation will be remembered and what footprints it will leave in the places and fields in which it worked. Instead, Atlantic’s leaders have mostly focused on accomplishing a few clearly defined goals, nearly all of which were pursued in partnership with others, and most of which were milestones, not final destinations, on the path of ongoing social change. Only in its last episode has the Foundation aimed, deliberately and expressly, at cementing a final legacy uniquely its own: the Atlantic Fellows. In this case, to be sure, the envisioned outcome is not any predefined solution to any specific social problem. The legacy, rather, is to be the Fellows themselves — their vision and energies, the opportunities they seize, the people they inspire, the strides they make, in whatever field and in whatever way, beyond any possible predicting by the Foundation that gave them its support and then departed, leaving them to write their own future. ■

HARVEST TIME FOR THE ATLANTIC
PHILANTHROPIES
2017-2019:
THREE ENDINGS AND A BEGINNING

I.
Three Endings

II.
A Beginning:
The Birth of the
Atlantic Fellows

III.
Public Policy,
Limited Life, and the
Vicissitudes of History

IV.
Communications:
The Story Continues,
the Narrator Departs

V.
How It Ends – and Goes On

MOST LARGE FOUNDATIONS plan to live forever. The rest set a date to end and then wrap up, once and for all. But when The Atlantic Philanthropies — at its peak a multibillion-dollar international institution founded by entrepreneur Charles F. Feeney — closes its books in the final months of 2020, it will have ended not once, but at least three times.

The first ending came when the Foundation drew its decades-long programs for health, children, human rights, and aging to a close. That sunset began in 2012 with the gradual making and winding down of scores of final grants, whose goals — better access to health care in the United States, improved services for children and older people in Ireland, more secure rights for the rural poor in South Africa, a sweeping reform of primary care in Viet Nam, and many others — had been pursued steadily for several years and required at least two more years to finalize. The final grants in this category were committed in 2015 and the last few were deemed closed and completed in 2019, though the vast majority had been booked and filed away much earlier. With that ending, The Atlantic Philanthropies that most people knew — certainly the one that most longtime grantees and employees had known — was no more.

The Atlantic that remained after that conclusion still had assets in excess of \$1 billion. But it was a much different institution, with a steadily shrinking staff, focused on a smaller number of big, broad, sometimes audacious objectives. Most of these were derived from the goals of the earlier programs, but they were different in many ways. They were meant not to continue but to “culminate” the years of effort that had preceded them. In its new incarnation, Atlantic’s grantmaking was rebranded as Global Opportunity and Leverage, or GOAL. The grants in this new approach tended to be significantly larger than those of the past (routinely characterized as “big bets”), and were usually aimed at scoring a selection of final, large-scale achievements in a relatively short period — typically between three and five years.

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THE GOAL PROJECTS INCLUDED CREATING

- **THE SOCIAL CHANGE INITIATIVE**, based in Northern Ireland but with an international mission to galvanize social activism and promote conflict resolution;
- **THE CIVIC PARTICIPATION ACTION FUND**, a special grantmaking nonprofit authorized to engage in U.S. lobbying and political activity in pursuit of social and racial equity and greater voter participation;
- **A SWEEPING NEW NATIONAL DEMENTIA STRATEGY** to revolutionize services for people with cognitive illnesses in the Republic of Ireland;
- **A NEW MULTIPURPOSE COMMUNITY CENTER**, the Isivivana Centre in Khayelitsha, Cape Town, South Africa to provide headquarters and meeting space for several of Atlantic's former grantees there;
- **A NEW POLICY DEVELOPMENT SHOP** at the Center for Budget and Policy Priorities, a progressive American think tank;

AND DOZENS OF OTHER INITIATIVES AND ORGANIZATIONS AROUND THE WORLD.

Most GOAL grants, as Atlantic CEO Christopher G. Oechsli pointed out in a 2015 essay, were overtly focused on changing public policy to promote social, economic, and racial equity. "Our experience has shown," Mr. Oechsli wrote, "that making large, purposeful philanthropic investments *now* in effective advocacy can enhance and sustain rights and protections that make tangible differences in people's lives *now* and for the longer term."¹ Although that statement was consistent with the philosophy of the previous Atlantic programs, it represented a substantially different way of looking at philanthropy: less a matter of running sustained, incremental, carefully plotted demonstrations and measuring their results, and more a frontal attempt to reorient public debate on the big questions of the day. GOAL was not preoccupied mainly with the mechanics of social systems; it was aimed at equipping and amplifying forces in the vanguard of social movements.

The stream of GOAL grants took several years to roll out in full. They then remained on the Foundation's books for a few more years, some requiring continued back-and-forth between grantees and Atlantic staff. But most were closed and consigned to the Foundation archives by the end of 2018, around five years after they began. And with that conclusion, the second version of Atlantic came to an end.

BUT EVEN BEFORE that happened, Atlantic’s third and final incarnation had begun, in the form of a massive new investment in leadership development called the Atlantic Fellows. What eventually grew into a network of seven fellowship programs to advance “fairer, healthier, more inclusive societies,” linked by a central hub and resource center called the Atlantic Institute, began taking shape in 2016. Each of the seven Atlantic Fellows programs was new. All but one were designed in close consultation with Foundation staff and consultants. Each was funded to undergo a two- to three-year incubation period, after which, if the Foundation considered the result satisfactory, the program would receive an eight- or nine-figure final grant that would allow it to carry on for another 10 to 20 years.

Where the first Atlantic iteration had concentrated on engineering particular social changes, mostly through discrete projects, demonstrations, and advocacy campaigns; and the second, the GOAL phase, had funded big, swing-for-the-fences changes in social policy; the third Atlantic was taking the most long-term and indirect approach of all: backing social-change leaders dedicated to a core of common values and visions, and investing in whatever future they might endeavor to create. Atlantic Fellows programs would provide these rising stars with opportunities to build their skills and talents, network with one another, pursue projects, and widen their spheres of influence.

Again, this newest incarnation of Atlantic was not a fundamental philosophical departure from the past — the goals of “equity, opportunity, and human dignity” were straight out of a Foundation vision statement from 15 years earlier, and developing human capital had been a theme of several of the earlier programs. But it was a profoundly different *kind of philanthropy*, based on an idea of how to use charitable dollars that differed markedly from either of the two models that had preceded it.

The goals of

“EQUITY, OPPORTUNITY, AND HUMAN DIGNITY”

WERE STRAIGHT OUT OF A FOUNDATION

VISION STATEMENT FROM 15 YEARS EARLIER.

IT WOULD ALSO LEAD to a completely different *kind of ending* from the previous two. Though it may seem odd to say, Atlantic's final ending will be less final than either of the two earlier ones — or at least less immediate. When grants from the longstanding programs ended, Atlantic's involvement in them was over. When GOAL funding ended, the grantees would have to find new contributors or bring the newly funded activity to a halt. True, in both cases the Foundation's influence would linger in the atmosphere for many years, in the form of new institutions and programs in which Atlantic had invested, or new public policies it had helped to promote, or newly potent movements and causes it had energized. But the direct influence of the Foundation and its personnel over how these activities and organizations progressed essentially disappeared with the final grant payment. For those grantees, The Atlantic Philanthropies would be only a memory.

But when the last grants for the Atlantic Fellows programs are disbursed — and even when the institution that disburses them is formally dissolved at the end of 2020 — the Foundation's vision and aspirations for these programs are intended to remain a critical factor in the way they do business for many years. That is only partly because the programs will be funded for up to two more decades. Beyond that, built into the programs' founding documents are other reasons why the Foundation's imprint on them is likely to endure. These provisions will be covered in the next section of this report.

First, however, it is worthwhile to take a closer look at the three different endings of The Atlantic Philanthropies, the features they have in common, and the lessons they teach about the complexity of bringing a large charitable institution to a productive close.

The first ending was exceptionally labor intensive, requiring more than two years of planning, negotiations with grantees and co-funders, and sometimes desperate attempts to help highly dependent grantees survive the departure of their largest funder. (This was described in detail in the fourth report in this series, subtitled "2012-2013: Decline and Rise.")

The second ending avoided those problems by making grants that were expressly not renewable and that were in most cases aimed at seizing ripe, one-time opportunities, not establishing an ongoing relationship. True, the opportunities in question were meant to have long-term consequences that would far outlive Atlantic. But the investments had at most a five-year horizon, and many were shorter. (These grants are detailed in the fifth report in this series, "2013-14: Final Priorities.")

The third ending will coincide with the end of the Foundation itself, so there is no chance that grantees can expect any further support. But, as we will see, the final grantees are expected to continue operating almost as avatars of their founding institution, under Charters designed to project Atlantic's values and vision into the future functioning of the Atlantic Fellows programs — indeed, into their very identity.

DESPITE THESE DIFFERENCES in form and consequence, each of the Foundation’s endings offers some lessons that run consistently through all of them. The first is that **ENDINGS TAKE TIME**, often more time than seems necessary at the outset. Even the last of Atlantic’s conclusions is progressing more slowly than initially planned, although its terminal date is considered firm. As the Atlantic Fellows programs organize and choose their first cohorts of Fellows, it is increasingly clear that some are taking longer than expected to jell, and several Foundation observers wish the incubation process could have been a few years longer.

The first two of Atlantic’s endings were likewise more drawn-out than expected — not because of any flaws in how they were executed, but because ambitious, well-made grants usually take a long time to achieve their purpose. Final grants, in particular, can take years to satisfy their conditions and requirements and to complete their intended work. Expected completion dates often slip; the compilation of final evaluations, lessons, and archival records can tack on additional months. If a grant is intended to serve some longer-term or indirect purpose, forging the connections between the completed work and its follow-on goals may demand still more time and effort.

For example, Atlantic’s GOAL grant to create the Isivivana Centre in the fast-growing township of Khayelitsha, in South Africa’s Western Cape, directly supported the construction of a modern, purpose-built office building and community center. Like many construction projects, it took longer than expected to get started. But the larger intent of the grant was not to put up a building; it was to strengthen the community and to secure the health and vitality of the organizations and activities that were meant to occupy it. A new community-based organization was needed to operate the building and ensure that it met local needs. Finding the right tenants and programs to operate in the new space added to the duration of Atlantic’s involvement. Without that extra time and effort, declaring the grant “completed” would have been hollow.

Endings take time, often more time than seems necessary at the outset.

IN OTHER CASES, final grants carried demanding matching requirements, which took some organizations a long time to satisfy (some are still struggling as their deadlines approach). Until those requirements were met (or, in some cases, relaxed or lifted), final checks could not be disbursed. In the meantime, members of Atlantic's rapidly shrinking staff had to verify that matching commitments were real and that any other final conditions on the grant had been satisfied. In other cases, final Atlantic grants supported brand new activity that required recruiting and hiring staff and forming productive teams — all processes whose duration is notoriously hard to predict. It is a rare grant that can be closed and forgotten soon after it is made, if the funder hopes to ensure that the money is used as intended. For Atlantic, the need to keep track of these final requirements, and to accommodate slippages in the performance schedule, imposed some unexpected demands on the remaining staff.

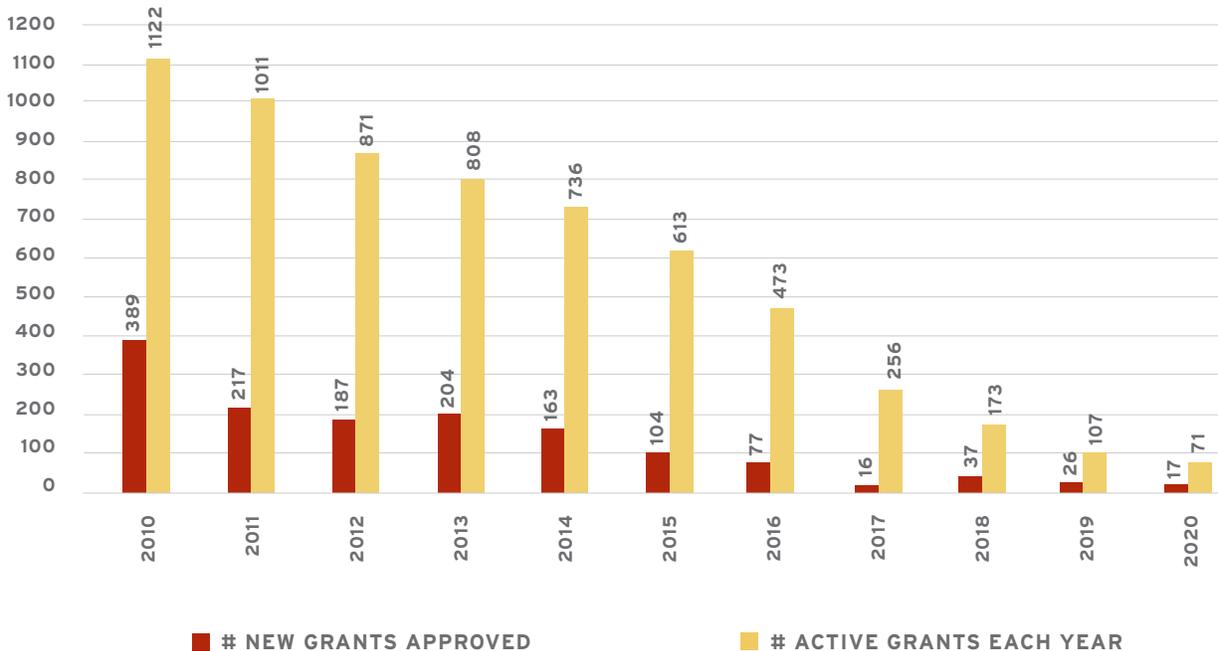
This leads to a second lesson, perhaps a corollary of the first: **ONE CRITICAL FUNCTION OF A FOUNDATION NEARING THE END OF ITS LIFE IS THE CONTINUED MONITORING OF FINAL GRANTS** as they approach the date when they are complete and set to be closed out. This is different from the routine grants *management* that all large foundations conduct all the time. For a foundation in its final years — especially one in which the program staff is gradually dwindling — the relationship between the funder and the grantee takes on some unique qualities and imposes some essential obligations on the foundation as it nears its end.

To begin with, the normal motivation that ensures grantee compliance with the funder's requirements — the hope of future support and goodwill — no longer applies. As a result, the foundation needs to be more vigilant than normal in ensuring that all the required work is completed as promised. If evaluations or reports are part of the project, these need to be reviewed, circulated, published, or otherwise put to their intended use. At most foundations, these are tasks normally performed by program officers and their associates, usually without attracting much notice. But if a foundation is approaching its end and its staff is shrinking, program personnel may be in short supply. The foundation needs to be sure that some knowledgeable remnant is monitoring the unfinished work, responding to grantees' questions or problems, and determining when final payments can be made and grants can be deemed finished.

Atlantic came to this discovery somewhat later than it would have wished (the process is described in the sixth report in this series, "2014-16: Finished, But Not Done," beginning at p. 42). In 2016, the Foundation noted, with some alarm, that many grants were taking longer than expected to close, and thus the number of active grants was not declining nearly as fast as expected. The demands of monitoring them all were being piled onto a smaller and smaller program staff. Atlantic responded by creating a new Grants Monitoring Team, which quickly took responsibility for overseeing the backlog of open grants, spotlighting problems that needed to be solved, and making final payments as soon as the outstanding issues were cleared.

THE TEAM'S WORK was supposed to continue for two years, by which time nearly all grants from Atlantic's past incarnations were expected to be completed and archived. But that timeline proved somewhat optimistic, and three years later, in mid-2019, the last of the grants monitors was still on the job, with a few more months of work to tie up.

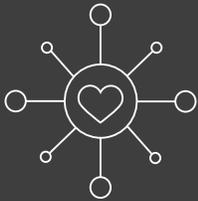
NUMBER OF GRANTS APPROVED AND ACTIVE



The third lesson from Atlantic's three endings is that **EVEN "COMPLETED" GRANTS USUALLY AREN'T FINISHED**; they end in an ellipsis. Most of the time, the achievements that a foundation supports are just steps toward some more-distant goal. The victories are usually partial and sometimes fragile, the obstacles and pitfalls only partially overcome, with more threats and vulnerabilities looming ahead. As a result, even when a foundation's institutional story is over, the story of what it has done (or sought to do, or may someday have contributed to doing) goes on. If a foundation is not especially invested in communicating what it has learned and accomplished — as Atlantic was not, for most of its history — the fact that its story ends in something of a cliffhanger may not matter much. But Atlantic later grew to embrace strategic communication as a centerpiece of its program in its final years, and has made a belated art form of distilling and spotlighting what it has learned. So it has had to devote considerable attention and effort to helping its story live on, at least in archival form, after it has left the scene. A later chapter of this report will look at these long-term communication challenges in more detail. Suffice, for now, to say that only a small share of Atlantic's stories have anything resembling an ending. The rest will be told, if at all, by future commentators drawing from the giant time capsule of the Atlantic Archives at Cornell University.

THE INESCAPABLE REALITY about bringing a limited-life foundation to a close is that the real value of its final years of work — maybe even the value of *all* its years of work — can't be tallied during the foundation's lifetime. The end of a time-limited foundation is always an act of faith — that good grants will lead to good results, that those results will produce ripples of follow-on benefits over time, and that adverse surprises along the way, which are unavoidable, will be met by future leaders and funders who will be equal to the challenge. The most a foundation can do in its last years to harvest the judgments and lessons of its active years is to leave a clear accounting of what it did and why, and a record of what it believes it learned along the way. From there, the discussion, and the reckoning, will be in the hands of others. ■

The end of a time-limited foundation is always an act of faith — that good grants will lead to good results, that those results will produce ripples of follow-on benefits over time, and that adverse surprises along the way, which are unavoidable, will be met by future leaders and funders who will be equal to the challenge.



II.

A BEGINNING: THE BIRTH OF THE ATLANTIC FELLOWS

FOR ITS FINAL ROUND OF GRANTMAKING, beginning in 2016, the Atlantic leadership set aside nearly \$700 million, to design, incubate, and launch what at first were six leadership-development programs known as the Atlantic Fellows. The programs and the rising social leaders they nurtured would be linked to one another through the Atlantic Institute, based at the Rhodes Trust in Oxford, England. Each program involved one or more host institutions — typically universities or large, anchor nonprofits — that in some cases would draw on other organizations to work as partners, providing learning or field-work opportunities for the annual cohorts of Fellows. The host and partner organizations might offer ways of honing leadership skills, designing and carrying out projects, networking with and learning from other Fellows, and seeking collaborative possibilities that might transcend disciplines, geography, and cultures.

It was an enormous undertaking, spanning five continents, nine hosts and dozens of partner organizations, an array of disciplines and fields from brain health to racial justice to social and economic equity, and ultimately hundreds of Fellows a year, all underpinned by common values and aspirations to advance what their mission statements called “fairer, healthier, and more inclusive societies.” Just the preliminary consultations and research took roughly two years to complete. Each of the six new programs would then have to be organized and staffed, incubated, refined, and adjusted, assessed for its readiness for long-term funding, and then formally launched with a major sustaining grant — all in less than four years.

Then, in the first half of 2018, the scale of the challenge rose one more notch. A seventh Atlantic Fellows program, a health-equity leadership program based at George Washington University, was added to the list.

The GWU program had already received \$6 million from Atlantic a couple of years earlier, but that was originally meant to be a one-time grant, to help the university design a program and inaugurate it with two cohorts of Fellows. Only when it proved to be an exemplary model of leadership development and networking did the Foundation come to see it as a logical addition to the Atlantic Fellows structure. And the fit was striking: Like the first six Atlantic programs, the fellowships at GWU drew a diverse mix of rising leaders, several from outside the United States, into a rich year of integrated learning, practice, professional development, and networking that would set them up for influential careers as innovators and drivers of change.

AT LEAST AS MUCH as any other host institution in the Atlantic galaxy — and even more so than some — GWU viewed the fellowships as integral to its educational mission, and particularly that of its Department of Health Policy and Management. In addition to in-person activities for its fellows, the university had created a first-rate online learning component that could be a model for other Atlantic Fellows’ digital programming. After some negotiation over program content, recruitment, and other particulars, Atlantic’s Board welcomed GWU’s Leaders for Health Equity Fellowship Program as the seventh member of the Atlantic Fellows family.

Each program was given a long formal title consisting of three parts: (a) “Atlantic Fellows,” (b) the cause or problem on which the program focused, and (c) the host institution. Thus the seven programs (six of which were detailed in the previous installment in this series of reports, “2014-2016: Finished, But Not Done,” Part I) were officially known as **THE ATLANTIC FELLOWS FOR:**

- **EQUITY IN BRAIN HEALTH**, at the Global Brain Health Institute, a partnership between the University of California, San Francisco, and Trinity College Dublin, aimed at reducing the scale and adverse impact of dementia;
- **HEALTH EQUITY: SOUTHEAST ASIA**, at the Equity Initiative, a program of the China Medical Board based in Bangkok, Thailand, focused on promoting and improving regional health equity, particularly among the most vulnerable and marginalized populations;
- **HEALTH EQUITY: SOUTH AFRICA**, at Tekano, a new nonprofit organization established with Atlantic support, dedicated to bridging the gulf between rich and poor to build a nation where all people enjoy better health and well-being;
- **SOCIAL EQUITY**, at the University of Melbourne, seeking to harness Indigenous knowledge and ingenuity to create positive social change;
- **RACIAL EQUITY**, at Columbia University in New York and the Nelson Mandela Foundation in Johannesburg, working to create the institutions, narratives, and policies that will advance racial equity and justice;
- **SOCIAL AND ECONOMIC EQUITY**, at the London School of Economics’ International Inequalities Institute, addressing the major global challenge of entrenched and growing inequality; and
- **HEALTH EQUITY: U.S. AND GLOBAL** at George Washington University’s Fitzhugh Mullan Institute for Health Workforce Equity, the newest of the seven.



E PLURIBUS

BY THE START OF 2018, almost two years into the massive creative enterprise behind the Atlantic Fellows, executives at Atlantic were growing concerned that, while the programs were separately coming into focus, the whole was not yet jelling. Despite the establishment of the Atlantic Institute to help link them all together, what was supposed to coalesce as an international community — not just a lot of stars, but a constellation — was still functioning largely as seven loosely related start-up endeavors. The unifying role of the Atlantic Institute remained unfocused; the Institute had no authority over the other programs, but it was supposed to provide them and their graduates, known as Senior Fellows, with ample inducements to interact and forge a common identity. It was set up to offer some mix of programs and publications on common themes, provide economic support for cross-program projects, and create other opportunities and incentives to work closely together. But what would those programs and incentives be? How would they be organized and managed? And would they be strong enough to draw such disparate initiatives, in such distant places, into solid bonds of communication and collaboration?

At this stage, as 2017 turned into 2018, the vision of a common global network still seemed more compelling to Atlantic's Board and executives than it was to many of the people setting up the fellowships. Two of the programs — the ones for Brain Health and for Health Equity in Southeast Asia — had already been launched before the idea of the Atlantic Institute or its global community was defined in any but the vaguest terms. These two programs were born from the culminating efforts of the GOAL years, intended to cap earlier Atlantic work on human capital in health care, although their formation soon led Atlantic to a more expansive vision for a worldwide network of international fellowships. But while that unifying, international vision was still evolving, organizers of these first two programs had promptly set about creating their own separate identities, with their own methods of recruiting Fellows, their own approaches to curriculum and project development, even their own logos and websites and public statements of purpose and vision. The idea that there was a major unifying thread linking primary health care in Southeast Asia with brain health in the United States and Ireland had frankly not occurred to them.

Later, even after Atlantic had made the prospect of a unified global network the centerpiece of its vision for the Atlantic Fellows, leaders of some of the programs still found the concept perplexing. "Why are we doing this?" one close observer heard them asking. "Why are we, as separate programs with our separate geographies and fields and missions, supposed to be working together? And what is the role of the Atlantic Institute?" A few program leaders — perhaps still struggling to clarify their own direction, or under intense pressure to get their fellowships up and running — bristled at something they perceived as a push to homogenize or blend their work into that of a far-flung group of other actors. Why, they asked in effect, should we spend precious time and effort on finding common ground with distantly related fellowships, rooted in other places and dealing with other problems?

DESPITE SEVERAL EXPLANATIONS by Chris Oechsli and others at Atlantic, both oral and written, the answer to those questions was neither simple nor obvious. Some of the Atlantic Fellows programs did deal with overlapping issues: For example, racial equity, economic inequality, and health equity shared some important underlying themes. But except in the most general way, did brain health and racial justice fit under the same umbrella? Did health equity in the United States have all that much in common with social equity for Indigenous people in Australia? For programs that were trying to imbue their missions with a unique sense of urgency and a distinctive set of challenges and possibilities, the idea of linking to other causes and populations seemed like an extra burden at best, a distraction at worst.

Yet to Atlantic, the links were not an add-on, they were the heart of the matter. Admittedly, the creation of the programs for Brain Health and for Health Equity in Southeast Asia had been started before the Foundation had begun thinking about how all the Atlantic Fellows initiatives would fit together. And those two initiatives had been, at first, left to drift in separate directions without much encouragement to coordinate with each other. Still, even as the first two programs were taking shape, Chris Oechsli and the Atlantic Board were becoming more and more clear that their ambitions had less to do with neuroscience or Asian health care or any other specific equity challenge *per se*, and much more with cultivating the qualities of leadership, inspiration, and action that foment movements for all kinds of social change. The point of the fellowships — the very reason they were the capstone of the Foundation’s 35-plus years of philanthropy — was that they were meant to enrich the future with a legion of pacesetters for justice and equity. That was an endeavor common to all the programs, the underlying *raison d’être* from which all of them sprang.

It was not until July 2018 — when 267 Atlantic Fellows formally completed their participation in the program and emerged as Senior Fellows — that the full international constellation of programs and purposes finally began to come into focus. This would be Atlantic’s first opportunity to present the programs and the Fellows to the world as a unit, a single body of leaders gathered from 37 countries and representing multiple fields and disciplines. The press announcement sounded the message of global coherence forcefully:

“The Atlantic Fellows are energetic, diverse, international leaders who are acting on the world’s urgent needs and collaborating to build healthy and equitable societies. The Fellows’ work, individually and as a community, represents our highest aspirations for what our founder, Chuck Feeney, and The Atlantic Philanthropies set out to achieve over 35 years ago,” said Christopher G. Oechsli, president and CEO of The Atlantic Philanthropies. ...

The Atlantic Institute, based at Rhodes Trust in Oxford, England, brings together Atlantic Fellows across all disciplines and borders and provides a lifelong resource for collaboration among all Atlantic Fellows, so they can continue to find solutions for global problems.²

NONETHELESS, no matter how forceful and heartfelt, this remained a description of the funder’s vision — the word “aspirations” was telling — not any kind of statement of action from the programs. For them, the message was at least starting to become clearer: They were expected to find common ground, and their progress toward final funding would be measured partly on that expectation. But the specifics of the final goal and what they were supposed to do to achieve it remained murky in 2018, at least among many of the programs’ principals.

Fortunately, the following July brought an opportunity to make the vision clearer: a pair of international meetings in Oxford gathered first the graduating Fellows and then the principals of all the programs to take stock of their progress thus far. In the run-up to these meeting, Atlantic staff made sure they would both provide plenty of time to discuss, in concrete terms, what the global community consisted of, what it meant, why it was essential, and what each participant’s place and role in it would be. Program leaders and Fellows participated in planning their respective meetings, formulated questions they hoped would be answered, and organized sessions focused on what an international network would mean for them and for their work. The result was something of a breakthrough. Looking back on the two meetings, an evaluator found the atmosphere to be “engaged, committed, energetic, passionate, and excited.” One participant described the Fellows’ event as bringing “a transition from wary skepticism to deep appreciation and engagement.”

There would still be some miles to travel, however, before all the aspirations for a global community of Atlantic Fellows could jell into something meaningful and durable. The many differences among participants at the 2019 gathering still posed a delicate problem of bridge-building and connecting — among Fellows with differing experience in social-change leadership, among specialists in widely divergent disciplines, and among people with profoundly different personal and cultural backgrounds. “This need not be a problem,” the evaluator observed, “although it will require careful and nuanced planning to ensure that the full range of the community is able to participate and benefit from the convenings,” rather than stratifying into more homogeneous subgroups. The deliberations and planning remain in progress as this is written, but the prevailing attitude at Atlantic and throughout the network has become markedly more hopeful.

ONE PARTICIPANT
DESCRIBED THE
FELLOWS’ EVENT
AS BRINGING

“a transition from wary skepticism to deep appreciation and engagement.”



A SEVEN-YEAR EFFORT IN FOUR YEARS

IT'S IMPORTANT TO NOTE that this lack of clarity or certainty would hardly surprise anyone who has started a new enterprise from scratch (not to mention eight new enterprises at once). Startups emerge from their founders' imaginations and ideas, but it takes time to summon a team that shares those ideas and then fully absorbs the imagination that motivates them. New enterprises aren't born fully formed, like Athena from the head of Zeus; they take time and inspiration, exhortation, and learning, to assume the identity their creators envision for them.

The problem for Atlantic, however, was that the time available to fuse the creative energies of scores of people operating seven programs and a central hub organization into an international whole was exceedingly brief. The Foundation was determined to close its doors in late 2020, just over four years from the first major steps in creating the fellowships. "I thought from the beginning," one early observer remembers, "that this was a seven-year project. But they were giving themselves four years, not seven. So the question was never, 'How do we make sure this is fully baked before we go out of business?' There wasn't enough time for that. The question would never be better than, 'How do we make sure there are compelling leading indicators of success that show this is on an OK path before we send it off to find its own way?'" There would, of course, be interim measures, milestones, and indicators of progress that would help to predict longer-term success. These would provide some assurance that a long-term investment was sound. But they would still be a long way from certainty.

At first, Atlantic's plan for "making sure this is on an OK path" was to exert a strong guiding hand during the incubation years. Beyond whatever time Foundation executives could spend working directly with each program, a team of Learning and Assessment Partners (the term "evaluator" proved to be off-putting and was quickly shelved) would add even more hands-on support and monitoring from the point of inauguration through to stabilization. They would act as observers and sounding boards for program managers as they made their way through at least five "milestones" representing the major stages of progress they were expected to make before receiving their final large grant — and, in effect, their independence. (The milestones and their significance are detailed in the previous report in this series, "2014-2016: Finished, But Not Done," at p. 22.) The Social Science Research Council (SSRC), an international research and policy organization, furnished the Learning and Assessment Partners for four of the programs and coordinated the others.

BESIDES PERIODIC PROGRESS REPORTS to each program — meant in the early years as advice and consultation with the managers at least as much as they were reports to Atlantic — SSRC and the other learning partners assembled a set of tools to help programs clarify various aspects of their mission leading up to independence. These included what SSRC described as “exercises for identifying the values and definition of success in the near- and long-term,” descriptions of the “arc” of each program’s work, and models and templates for such basic necessities as application forms for fellowship candidates, intake procedures for new Fellows, and activity plans for the major experiences Fellows will have during their time in the program. Generic slide decks helped programs organize two basic elements of planning: the Theory of Change (what difference the fellowship is supposed to make in the world) and the Theory of Learning (how the program will help its participants develop the skills and knowledge they need to excel).

These and other learning tools were meant, first of all, to guide each program through the milestones and to continually refine its concept of success and excellence. But more broadly, the tools were meant to place all the programs on a common track — for example, showing how “success” in one program bore important resemblances to success in others, or how the various theories of change and learning carried echoes that reverberated across many other programs. Not only was one of the five core milestones expressly focused on “inter-program coordination and participation,” but the various tools to help programs meet the milestones were likewise imbued with themes of cooperation, integration, shared learning, and cross-pollination.

As a way of shepherding the programs toward a more integrated global community, the various learning tools and reports went some distance toward conjuring a common imagination and a sense of belonging. A carefully crafted suite of communication and design products (to be described more fully later) likewise helped the programs see themselves more as siblings than merely as disparate passengers riding the same train. Still, beyond inspiring some appreciation for their common Atlantic ancestry and some feelings of mutual respect and affection, it was not clear in mid-2018 that the programs had yet internalized — or even fully understood — much of what Atlantic was asking of them.

Showing how “success” in one program bore important resemblances to success in others, or how the various theories of change and learning carried echoes that reverberated across many other programs.

AGAIN, this would have been merely an interesting challenge of multiple-institution-building — tortuous, more-than-usually complicated, but far from alarming — were it not for the clock hands on Atlantic’s intended lifespan, moving swiftly toward midnight. Once a funder departs the scene, its influence on future events disappears as well. At that point, its wishes and intentions may retain some moral force, but grantees no longer have any financial incentive to comply nor much fear of consequences if they do not. Though grantees can be held legally accountable for the formal requirements of their grants, enforcing that obligation is difficult in practice and would by itself offer cold comfort to a worried funder. With four, then three, then two years left, Atlantic could expect its hopes for the Fellows programs to endure only if, by the time it closed its doors, those programs shared a common vision and incorporated it fully into their operations.

The Foundation’s Board and staff understood this challenge, of course, and openly accepted its risks. “We will accompany these initiatives on their maiden voyage,” Mr. Oechsli had written in 2016, “ensure they are worthy and true to their designs and destinations, and then we will let them sail on.” But in 2018, with several programs still showing signs of uncertainty about their collective “designs and destinations,” it was clear the Foundation would need to do something more to help chart their course, before its influence started to fade.

With encouragement from several program directors, Mr. Oechsli and Benjamin King, Atlantic’s Chief Strategy Officer, had already begun to specify, in writing, the essential elements of a “worthy” Atlantic Fellows program. They saw this exercise not only as a way of giving the programs a plain mandate to guide them after the Foundation was gone, but just as important, as a way for the programs to put their *own* visions in writing — and thereby to elucidate their aspirations and harmonize them with those of the funder.

“Other than the original program proposals,” Mr. King pointed out in an early 2019 interview, “there weren’t any founding documents that would help hold these programs to what they were supposed to be and what they were supposed to accomplish long-term. So the idea was to have each program rethink and clearly articulate, ‘What are we as a program trying to accomplish? What is the program’s vision, mission, set of objectives? How will we govern ourselves?’ That would then be a founding document that would be approved by the program board and the host institution. And then, as part of that program-level Charter, Atlantic Philanthropies would write a preamble or an introduction that lays out the vision from Atlantic’s perspective as the founding funder: What do we aspire to achieve for this set of programs? Why did we do this? And what’s our theory and vision for the community?”

THE RESULTING Charter for each program would open with an introduction describing Atlantic’s goals and expectations, which would be the same in every Charter, across the whole Atlantic Fellows network. Then would follow sections specific to each fellowship, covering

- **THE PROGRAM’S PURPOSE;**
- **ROLES, RESPONSIBILITIES,** and decision-making authorities;
- **THE GOVERNING BOARD,** especially its composition and procedures;
- **ADVISORY BOARDS** or other governing groups, as needed;
- **FINANCIAL MANAGEMENT;**

and some additional sections and appendices with operating details like job descriptions, HR policies, partners and partnership agreements, and identity guidelines. These detailed documents would then be referenced in each program’s final grant letter, thus making their provisions more than just descriptions — they would effectively become conditions of the grant.



‘AN ENDURING VISION AND SET OF PRINCIPLES’

ALTHOUGH ATLANTIC WOULD review and approve all the programs’ completed Charters before “letting them sail on,” its first task would be to produce the introduction that would, in effect, define what “Atlantic Fellows” are — across disciplines, issues, and geography. After a couple of rounds of revisions, Mr. Oechsli shared a penultimate draft of the introduction with the directors of all the programs at their worldwide conference in July 2018. The point of the discussion, he told them, was not to seek edits or revisions — this would be Atlantic’s statement of its own intent, not a summation of other participants’ views — but to determine whether any parts were unclear or needed elaboration.

AS SUMMARIZED IN A FOLLOW-UP MEMO, he explained that the six-page introductory manifesto

aims to provide an enduring vision and set of principles to guide the community going forward — and clarify what these programs are, and what they are not. The Introduction is written to provide broad “constitutional themes,” while allowing programs the space to develop and refine (collaboratively and individually) specific practices within the broader frame.³

The statement began with a roughly 300-word definition of what Atlantic Fellows are (the nub: “a diverse, international community of leaders who share a deep commitment to advancing fairer, healthier, more inclusive societies”) and what the programs are supposed to do for them (“increase Fellows’ understanding, capacity, and commitment, and help them access the resources and networks that they need to accelerate their work and achieve demonstrable impact”). Next came a Theory of Change, which is worth quoting in full:

Advancing fairer, healthier, more inclusive societies requires values-based, solutions-oriented, and influential people — who are culturally and professionally diverse — to learn from one another and collaborate on solutions. The problems that the Atlantic Fellows seek to address are complex and systemic in nature and larger than any one person, community, or nation can effectively address alone or in the short-term. To allow for sustained interactions, relationships and progress, Atlantic Fellows are lifelong Fellows with ongoing engagement in the community over time.

The programs aim to strengthen and connect these emerging leaders with a shared purpose, identity, and community. Through global community, Atlantic Fellows — and the extended network of people and organizations they work with — can think and act collectively, both locally and globally. In doing so, these Fellows can make significant contributions toward solving some of the world’s pressing problems.

The recurring emphasis in these paragraphs on networking, cross-program learning, and an ongoing global community is a theme running through the whole introductory statement. Later sections detail how cohorts of Fellows are to be recruited (“from a range of backgrounds, professions, disciplines, and life experiences,” among other things) and what kinds of opportunities should be provided for them (such as “content and experiences that stimulate critical analysis and debate which is inclusive and productive, including perspectives that might challenge Fellows’ current beliefs”). But even among these quality guidelines expressly addressed to individual programs, the imperative of a “global community” gathered around a “shared mission” rings through almost every paragraph.

TO REINFORCE AND ELABORATE on that message, the statement delivers a forceful instruction:

To provide Fellows with a strong sense of mutual experience, recognition, and belonging to the global Atlantic Fellows community, programs should collaborate, with the support of the Atlantic Institute, to identify common experiences, materials, and core curriculum content. This will include but not be limited to the following: common core materials to orient selected candidates, shared elements in the Commitment that Fellows make to their program and community, a global induction module, shared elements of curriculum, program-to-program encounters (where possible), graduation requirements and rituals, and an in-person introduction to their global cohort and the lifelong Atlantic Fellows community.

The logical next question, as one observer put it, is: “*Or else what?*” With varying amounts of unease, people following the development of the Atlantic Fellows have asked what would happen if, say in four or five years, a program decided to follow its own path, distance itself from the global network, and violate the letter or spirit of its Charter’s introduction, even if only in part. With the original funder long gone, who would enforce the programs’ original intent, if anyone?

Atlantic’s introduction to the Charters provided one almost reluctant answer: the Atlantic Institute — which, for more than a year, had been meticulously designed and described as a service organization, providing resources and program enrichments, all carrots and no sticks. Yet the Institute’s governing board, according to the introductory statement,

will also play a role as the custodian of the Atlantic Fellows community and its mission and vision. ... By super-majority (maximum of 1 dissenting vote) the Atlantic Institute Governing Board may, ... with good reason and consistent with the Charter, remove (or add) an Atlantic Fellows program from the community. Removal would be due to lack of meaningful participation in the community or adherence to its shared principles. It implies a loss of access to Atlantic Institute funding and support for the program and the program’s future participants, and to the shared Atlantic Fellows identity.⁴

Programs should collaborate to identify common experiences, materials, and core curriculum content.

AS ENFORCEMENT MECHANISMS GO, this one was intentionally mild. In the worst case, a wayward program would find itself without access to the services and financial support available from the Atlantic Institute and unable to offer its participants a place in the network of other fellowships. It would mean a loss of prestige and money, and of the opportunity to connect with many other distinguished people. But it would hardly be fatal.

Atlantic executives have been clear from the beginning on three reasons for confidence that the programs would be faithful to their missions. First, the programs have been designed, and are being incubated, specifically around principles that make a global network highly attractive. They are being set up as learning, collaborating, multidisciplinary organizations from the beginning; those values will be, in a frequently used phrase at Atlantic, “in their DNA.” A program that seemed at all inclined toward any other vision would be unlikely to make it past the incubation period.

Second, the values and practices that qualify a program as part of the Atlantic Fellows family had become, by late 2018, highly appealing to the program directors and to the individual Fellows. In fact, many of these underlying values were already central to the missions of the organizations behind the fellowships. In other words, most of them were not signing on to a new set of principles and aspirations, no matter how appealing. They were gaining resources and allies for principles they already held and were seeking to promote. Furthermore, once the fellowships make it past the incubation stage, the sponsoring organizations are to get ample funding to fulfill their responsibilities as members of the network, so full and faithful participation will not be a fiscal burden. Thereafter, the networking activities required of them would all be designed to enhance, not intrude upon, the regular activities of their fellowships. The Rhodes Trust, where the Institute is housed, has long experience in cultivating an international reputation for prestige, fellowship, and exceptional talent. The services and activities of the Atlantic Institute should therefore become even more attractive to both staff and participants in the programs over time, further deepening and widening the benefits of being an Atlantic Fellow. In short: Why would a program *want* to abandon this vision? The odds of apostasy, in Atlantic’s view, are exceedingly long and not worth a great deal of worry.

Finally, although Atlantic the foundation will disappear by the end of 2020, Mr. Oechsli will continue to monitor the governance of all the programs — and to sit on the governing board of the Atlantic Institute — for at least two years afterward. Although he will by then no longer have the authority of a funder, he will bear some of the Foundation’s lingering moral influence. He acknowledges some ambivalence about this role (“I have to be sure this is supportive, where people know I’m accompanying them, rather than looking over their shoulder”), but he hopes it will help in cementing the motivating idea of the fellowships into the operations of each program.



HOLDING THE CENTER

REGARDLESS of the mild enforcement role assigned to its governing board, the Atlantic Institute's real mission — and its main challenge — is to be a valued resource and helpmate to the community of fellowships. If it is also to be the nucleus holding the Atlantic Fellows together, its gravitational force will have to be almost entirely voluntary, attracting by persuasion and enticement, not by diktat. It should, in the words of one program leader, be seen “as a service organization — not in front, but underneath.”⁵ Given the extreme diversity among the programs, that will be a challenge both of diplomacy and of organizational development — a much harder puzzle than it may have seemed at first.

In the early months of 2017, still with no staff and only the broadest of mandates, the Institute's newly installed Executive Director, Penelope Brook, an economist and former World Bank executive, had set out on a round of consultations with her counterparts at all the Atlantic Fellows programs. Not surprisingly, what she heard was wide-ranging and far from unanimous. Proposed activities that seemed helpful to some struck others as marginal or even intrusive. Some respondents appeared to be more wary of the Institute's central role, with its implicit stature and control of resources, than hungry for its help. In some parts of the world, an organization based at an elite English institution bearing the name of a titan of the British Empire seemed alien and discordant. Dr. Brook concluded that what had been expected to be a brisk round of consultations followed by a detailed plan of action would in reality require more time, more listening, and less haste to swing into operation. She prepared a “preliminary operational plan” that was longer on goals and areas of focus than on concrete steps. This caution seemed wise to some and dilatory to others — yet another example of the difficulty of reaching consensus on the Institute's best route forward.

In hindsight, the diplomatic challenges in defining and building the Institute seem not especially surprising. For starters, its role is unlike almost anything in the fellowship world. It was not possible for Atlantic to say to Dr. Brook, “Go forth and replicate the Rhodes Trust” or the Aspen Institute or the Nieman Foundation or any other coordinator of prestigious awards and honors. There was no pattern for this kind of auxiliary-but-not-controlling central entity, and not even many comparable ideas and principles that could be adapted from other institutions. Dr. Brook was starting virtually from scratch.

A more fundamental challenge, however, was inherent in the very idea of who the Atlantic Fellows were: disrupters, mold-breakers, challengers of the status quo. This was not a group likely to gaze placidly at any structure or system without asking, “How could this be made better?” and “What might be unequal in this arrangement?” In asking for their guidance, Dr. Brook was inevitably inviting critique, a certain amount of interrogation, a distrust of easy consensus. Those qualities were (to borrow a phrase) in the programs' DNA; they could not be quickly charmed away.

ORGANIZATIONAL CHALLENGES, however, were more readily fixable, and several of them demanded attention. Evaluators found the Institute’s governing structure too diffuse, with too many sources of authority, including the Institute board, an advisory committee, the Rhodes Trust, and The Atlantic Philanthropies, plus the six (later seven) program directors. This tangle of influencers — all of them legitimate, but with decidedly different points of view, interests, and areas of focus — needed to be simplified and sorted. Assembling a staff would also be an urgent matter, not made easier by the lack of a clear action plan to determine exactly how the staff would be deployed. Fortunately, by the middle months of 2018, many of these issues seemed on a course to resolution, in no small part because of the assertive hand of Chris Oechsli and the Foundation, from whom Dr. Brook, her Learning and Assessment Partners, and the governing board all sought greater involvement.

Partly as a result of Atlantic’s guidance and support, the pace of progress in defining and focusing the Institute’s work increased substantially by the latter part of the year. The process of drafting and ratifying its own version of the Atlantic Fellows Charter went some distance in helping to resolve the Institute’s organizational questions and establishing a rationale for initial staffing and basic activities like conferences, databases, publications, and the creation of an online communication hub. Still, evaluators reported a continued need for tangible outcomes that programs would recognize as valuable — not merely activities, but clarity about the ultimate purpose of the activities, their expected and actual results, and the objectives that would drive future work.

The pressure on the Atlantic Institute to solidify, clarify, and move decisively was, in some ways, similar to that on all the Atlantic Fellows programs as they moved through their brief incubation toward a reckoning about their long-term future. But in other ways, the pressure on the Institute was arguably greater. The individual programs had a clear constituency (their Fellows), a single mission (to equip their Fellows with experiences, learning, and connections that would advance their work), a single field of endeavor (whether it be racial justice or brain health or socioeconomic inequality or some other reasonably well-defined social problem), and a general model for their operation that was not completely unique in the history of fellowships. None of the Atlantic Institute’s vision and operational plan enjoyed quite so much certainty.

NONETHELESS, by September 2018, evaluators were able to report that, in the words of one program executive, “A switch has been flicked from listening to acting,” thanks to a now reasonably complete Institute staff, an emerging action plan, and the launch of some tangible activities. To be sure, the diplomatic and organizational problems were not solved, nor was it yet clear what all the solutions would be. Programs were still asking what the form and purpose of the Institute’s networking and knowledge-sharing would be, and how (or whether) the programs would truly benefit from it. Still, a feeling of progress at least helped lift the cloud of anxiety that had troubled the early months of the Institute’s formation.

One source of that anxiety was inherent in the challenge of forging a coherent international community out of an assortment of proudly independent fellowship programs. For real cohesion to take place, a certain amount of continued persuasion would be necessary, and the Institute could not afford to exert much pressure on programs it was mainly supposed to be wooing and serving, nor was it equipped to do so. The only source of that kind of persuasive influence, the Institute and evaluators agreed, was the Foundation that created and would ultimately fund the programs. “Clear leadership on where, how, and when alignment is expected across programs needs to come from AP rather than AI,” evaluators wrote in early 2019, referring to The Atlantic Philanthropies and the Atlantic Institute. “This would provide a firm foundation for the AI to deal with the level of complexity within and across” the Atlantic Fellows programs.⁶

It would also mean a great deal more work for a Foundation whose staff was shrinking fast. By the time the evaluators’ recommendation was written and submitted to the Atlantic Board, the Foundation had shrunk to 11 full-time equivalents, just three of whom were primarily dedicated to program development. In that small circle, the Chief Program Development Officer was also the CEO, Chris Oechsli. Chief Strategy Officer Ben King, who had been intimately involved in the design of the fellowships from the earliest stages, could play a significant role in strengthening the organizational joists and beams holding the superstructure together. So could Chief Communications Officer Elizabeth Cahill, who oversaw the creation of the Atlantic Fellows corporate identity, basic messaging, and website. But the time horizon was now down to 24 months, and the challenges remained both complex and time-consuming.

“A switch has been flicked
from listening to acting.”



VARIETIES OF EXCELLENCE

QUITE APART FROM THE QUESTION of how individual fellowships would be woven into the global network, and how the Atlantic Institute would serve them, Atlantic and its staff and consultants also had to grapple with a more fundamental question: how to be sure the programs would be good enough — “worthy and true to their designs and destinations” — to qualify as stars in the Atlantic Fellows constellation. Unlike the question of establishing a harmonious international community of programs, this was a much more individual challenge. Each program would have to be excellent in its own way, in the context of what may be distinctive regional and cultural characteristics, philosophical and political considerations, and the range of component professions and disciplines that pertain to each mission.

The fields of neuroscience and gerontology, for example, would be integral to the Atlantic Fellows for Equity in Brain Health, but likely marginal for the Atlantic Fellows for Social Equity in Australia. Social scientists and other scholars would be central to the Atlantic Fellows for Social and Economic Equity at the London School of Economics, but possibly less so in the Atlantic Fellows for Racial Equity. Each fellowship would need to find its own alchemy of skills, interests, challenges, and goals, fitted into its own definition of where and with whom social progress was most likely to happen. Its particular theory of social change, the theory of learning that shapes its curriculum, the specific definition of “leader” that governs its selection criteria— all these things would have to be developed, refined, tested, and assessed program by program.

Some procedures could be harmonized among them — the message and tools with which Fellows would be recruited, selected, and introduced to the program, for example. But the soul of each program, the learning and practical experience their Fellows would undergo, would necessarily be different, maybe profoundly different, from one program to the next. The Learning and Assessment Partners would help in designing and polishing the curricula for each program (while also reporting on them to the Atlantic Board — a tricky double role as both confidante and independent arbiter). But by the end of the incubation period, programs would need to have demonstrated a clear and compelling grasp of all the essential elements — the whole arc of learning, practical action, interdisciplinary collaboration, and ongoing participation in the fellowship community — in order to graduate to full funding and independence.

“THIS ISN’T A TYPICAL FOUNDATION grantmaking exercise,” Chris Oechsli had reminded the program directors in late 2017. “At some point, AP, the enterprise, will complete our role and will invest the remainder of our funds and aspirations in you. We want, and need, a clear and shared appreciation of what it takes for AP to fulfill our obligations and be confident that the intent of this effort is embraced and sustainable, beyond the involvement of those of us who are presently driving these efforts.” A year later, with the time for final decisions about launching two of the fellowships fast approaching, Mr. Oechsli had to acknowledge that the “clear and shared appreciation” was still a work in progress, though the completion of the Charters had helped in picking up the pace and establishing common terms and expectations.

The end of 2018 and the start of 2019 represented a stark turning point in the relationship between the programs and the Foundation, as well as a shift in the role of the Learning and Assessment Partners. “Through the first half of the Atlantic Fellows program incubation period,” Mr. Oechsli wrote in a 2018 memo to the program directors, “we have aimed to learn and work alongside each of the programs to ensure we remain aligned as you process large amounts of new information and use that to refine your teams, program approach, and overall mission and objectives. As we look ahead to 2019, our role will need to shift to one of observation and assessment.” At the start of the new year, Atlantic executives stepped off of the governing boards of the programs and the Atlantic Institute, so as to make it clear that their role had changed, subtly but fundamentally, from that of guide, supporter, and champion to that of a prospective investor, determining whether to entrust very large sums to enterprises that it would no longer control.

Similarly, the Learning and Assessment Partners would shift subtly from the role of coach to that of referee. They would begin, Mr. Oechsli wrote, “transitioning out of a role where they are leading or facilitating the development of program content or the process of grappling with issues and potential solutions.” The evaluators would submit final reports to the Foundation, and beginning in 2019, “Programs should seek clarification on any questions related to final grant approval directly with AP, rather than LAPs, to avoid any confusion about AP’s expectations. If in doubt, please contact us.” The time for final decision-making was about to arrive.

FOR MORE THAN A YEAR, the Learning and Assessment Partners had been helping the programs create their own disciplined self-evaluation process. The goal was partly to prepare them for the time when the evaluation would be out of their hands, but even more to equip them with some basic tools for measuring their own effectiveness — the essential elements of what the Foundation and the evaluators call a “culture of learning” to foster continuous improvement. The Social Science Research Council (SSRC) and other learning partners created a set of benchmarks for each phase of program development, leading up to the eventual launch. Within each phase were measures corresponding to the major benchmarks Atlantic had established to indicate progress toward independence:

- **ROBUST PROGRAM STRATEGY** and organizational performance;
- **STRONG PROGRAM** design and execution;
- **EVIDENCE OF POTENTIAL** impact;
- **PARTICIPATION** in the wider Atlantic Fellows community; and
- **INCREASING ENGAGEMENT** and support for the program from the broader field.

As programs moved along from conception through various later phases of development, evaluators helped them create a checklist of necessary tasks to complete. Their performance on these tasks contributed to a numerical score with which the programs and Atlantic could know, with reasonable objectivity, how well they were progressing toward sustainable independence. Mary McDonnell of SSRC described the scoring regimen with an analogy to the Apgar Score, a neonatology metric that tells doctors whether newborns need certain kinds of medical attention to improve their odds of viability and longer-term health. For the newborn Atlantic Fellows programs, the learning and assessment teams devised something similar, which “suggests the extent to which a program is ready for handoff without additional intervention, and [whether] it is likely to be sustainable.” In this case, borrowing from the list of organizational milestones, SSRC informally dubbed its version the “GAPPAR Score,” for “Governance and Accountability, Program design and execution, Potential for impact, Atlantic fellows community, and Reputation.”

This score was just one yardstick by which the learning and assessment teams helped the programs measure themselves. Evaluators provided volumes of additional, fine-grained detail on every program’s progress, milestone by milestone. But the GAPPAR summary helped to sharpen everyone’s focus on the essential demands of the incubation process and to measure exactly where each program stood on the path from raw idea to fundable organization.

ESPECIALLY FOR PROGRAMS that started earliest and were farthest along the developmental path, the learning teams also helped create tools for gauging the substantive achievements of each program, as evidenced by the experiences of Fellows during and after their active participation. For example, the teams developed a protocol for interviewing individual Fellows at every stage of their participation. They also created prototype case studies by which programs could track and describe a Fellow’s progress through the program and beyond.

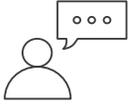
In practice, one close observer pointed out, program managers tended to be much more driven and meticulous about these substantive questions — making certain that the activities they offered were effective, and that Fellows emerged feeling enriched and invigorated — than they were about the more prosaic details of governance, management, accountability, and organizational development. Yet, to Atlantic, these bits of institutional engineering were critical to ensuring that the resulting programs would *remain* successful, well-run, and faithful to their missions year after year after year.

“So the idea of governance, broadly speaking, was one of the key themes for 2018,” this observer noted. “That included a lot of sub-components, like how well defined the program is, how well supported it is within its host institution, and whether the programs are supported by a strong governing board. Does that board have a clear understanding of how it links into the host institution? And is everyone clear on how the program delivers the most effective results, and how to ensure that that delivery continues?”

It is no coincidence that the evaluators’ main topics for measurement, and Atlantic’s “sub-components” of good governance and management, all tracked closely to the major sections of the new Charters. If the programs managed to define their vision and mission, their theories of learning and change, their structures of control and accountability, their staffing and budgets and business plans — and if they gained enough clarity and certainty to encode these things satisfactorily in their Charters — the odds would be much stronger that their long-term operation would, to recap Chris Oechsli’s 2016 formulation, be “worthy and true to their designs and destinations.”

CHRIS OECHSLI’S
2016 FORMULATION,

be “worthy and true to their designs and destinations.”



OPEN QUESTIONS

IN OCTOBER 2018, the first Atlantic Fellows program to complete its incubation, Health Equity in Southeast Asia, received its independence. With a final payment of \$34 million to the China Medical Board, Atlantic provided the means to sustain the fellowships for 10 more years. Despite some lingering uncertainties, the Board concluded that the essential elements were now in place for the program to succeed. As one Trustee summed it up, perfect confidence would never be achievable for any of these initiatives, but this one offered enough reason for satisfaction that the time had come to let go.

Still, the list of open questions wasn't trivial. Apart from some fine points of governance specific to the Southeast Asia program, several fundamental questions about the ideal structure and content of fellowships remained to be answered — not only for this program but, in all likelihood, for nearly all of them. Many of these questions would likely take several more years of experience to come into focus, perhaps well beyond the time of Atlantic's remaining life. Among the questions were these:

- **HOW MANY DAYS** of in-person activity are ideal for making a deep and lasting effect on the Fellows' future leadership prospects? And how many days would be *too many* — burdening the regular careers of people who are, in most cases, already driven and fully engrossed in their work?
- **WHAT KINDS OF ACTIVITIES** should Fellows be engaged in between their periods of in-person participation in the program?
- **WHAT WILL FELLOWS** be expected to do through the Atlantic Institute? What level of engagement with the global community is both realistic to expect and sufficient to ensure a vigorous, lively international network?
- **HOW DILIGENTLY** will the programs maintain the regimen of self-evaluation and continual learning and improvement that Atlantic set for them during the incubation?
- **AND, OF COURSE:** What will happen when the programs' current leaders move on, and new executive directors, governing boards, and officers of the host institutions step in to take charge?

THESE AND OTHER BIG QUESTIONS will linger in the atmosphere until early- to mid-2020, as Atlantic makes decisions every few months on the final funding each of the remaining fellowships. If the grant for the Atlantic Fellows for Health Equity in Southeast Asia is a fair indication of what's in store, even the strongest programs are likely to head into their futures with some sections of their operating plans still written in pencil, needing more time to experiment, and awaiting a post-Atlantic future when a fuller and more field-tested version can be written in ink.

To gain as much clarity as possible, and to firm up the programs' commitment to Atlantic's vision and values, Chris Oechsli spent much of 2018 and early 2019 on a grueling round of travel, visiting every program more than once, meeting with their principals and Fellows, and working through their questions (and Atlantic's) about how the future would unfold. Although he confesses to some exhaustion from the painstaking schedule, he believes that it is bearing fruit and that uncertainties, at least in most of the programs, are diminishing steadily.

In an interview in early 2019, he conceded that some questions would remain at least partly unresolved when final decisions are made, but he felt relatively untroubled by the thought of leaving the answers to the wisdom of later years. "What do we need to get to?" he asked rhetorically. "What level of confidence do we need to have that an organization can transcend, survive, have resilience to move beyond, say, the next leadership change? It's true that we've been a little more directive in this phase of our work than we were in the past — there's been a bit more of 'Here's what we'd like to see happen, and this is the way we'd like to see it happen.' But ultimately, we're doing what we've always done: We're supporting people who we think are aligned, who have the values and capabilities to do the things that we aspire to see done. We've given them time and support to test the alignment and give us both a chance to see if it can endure.

"And if we're both confident that it can, well, then at some point, we let go." ■

"And if we're both confident a project can endure, well, then at some point, we let go."



III.

PUBLIC POLICY,
LIMITED LIFE, AND THE
VICISSITUDES OF HISTORY

■ **MOST OF ATLANTIC'S GOAL GRANTS**, made between 2014 and 2016, were aimed at turning the best lessons and discoveries of the Foundation's previous three decades into lasting changes in public policy. Some of these grants had other purposes as well, but as Mr. Oechsli put it in his public introduction of GOAL, the biggest and most ambitious grants in this period constituted "large, purposeful philanthropic investments *now* in effective advocacy."⁷ At its core, GOAL was an investment in megaphones. It sought to fortify the Foundation's most cherished causes in the public policy arena, whether by supporting advocacy campaigns, by backing institutions and people who lead and inform such campaigns, or, in some cases, by directly funding public agencies and their nonprofit allies to implement new ideas.

As it turned out, these years were a difficult time for making what Mr. Oechsli called "final big bets on a more democratic and equitable future." Nearly everywhere Atlantic had been working, political tides were turning. By early 2016, the advance of anti-immigrant and far-right political parties across Europe was gathering steam, and anti-immigrant sentiment was rising in Australia and South Africa. Scandals that would eventually bring down President Jacob Zuma in South Africa were beginning to attract widespread attention at home and abroad, casting a shadow on the legitimacy of that country's post-apartheid democracy. Britain's decision in mid-2016 to exit the European Union triggered a prolonged period of economic and political anxiety in both parts of Ireland, threatening to slow progress on peace and social equity there. Then, in November 2016, came the American presidential election that would bring an abrupt change of direction in nearly every aspect of U.S. policy.

It was not as if all hope was lost. But in many areas of signature Atlantic investment — migration, health care, economic and social inequality, racial justice — the momentum seemed to be slackening and headwinds were gaining force. In the United States in particular, it was as if a bridge had collapsed, and the route forward on issue after issue had suddenly vanished or become much harder to discern.

The starkest example was in immigration, where Atlantic had spent years, and more than \$70 million in aggregate grants, trying to build support for comprehensive immigration reform. Although such efforts had failed in Congress at least three times during the preceding decade, polls suggested that public support had gradually been rising, and that a new administration and Congress might have a chance at real progress. But then came the 2016 election, which was decided, at least in part, on hostility to immigration. The gathering sense of optimism all but vanished.

SIMILARLY, Atlantic had devoted around \$30 million in recent years to reforming racially biased “zero tolerance” policies in American school discipline. The effort had seemed to score a major breakthrough when, in 2014, the Obama administration’s Department of Education largely adopted the Foundation’s approach. Almost immediately, nearly 50 of the largest school districts and more than half the states responded with changes to school discipline that mirrored the administration’s and Atlantic’s position. Then, at the end of 2018, the Trump administration ordered an about-face, revoking the Obama-era changes and reasserting support for the full force of “zero tolerance.”

Something comparable happened in what had once seemed like a steady march toward reducing, and eventually eliminating, legal executions in the United States. After investing \$62 million over a dozen years in a multifront battle against the death penalty, the Foundation, its grantees, and their allies were beginning to see some tangible victories (most prominently a ban on the execution of juveniles), and other signs of momentum were mounting. By 2019, 21 states and the District of Columbia had abolished capital punishment outright, and in four others, governors had imposed moratoriums on the practice. Public support for the death penalty was eroding. No federal execution had taken place since 2003.

Then, in 2019, the Trump administration hit the brakes. In July, Attorney General William Barr ordered the Federal Bureau of Prisons to set dates for at least five federal prisoners to be put to death and promised further executions. Whether this change will do lasting damage to the societal movement away from capital punishment, or whether it will be merely an interruption, is too soon to tell. But for a foundation in its last months of operation, following a long and seemingly successful drive toward a deeply felt goal, it was a disheartening turn of events.

Even in places where political currents weren’t overtly hostile, subtler shifts disrupted some of Atlantic’s longstanding public policy efforts. In Oakland, California, for example, the Foundation had allocated some \$15 million to promoting “Linked Learning” in the public schools — an ambitious and complex initiative that wove together educational improvements, connections between schools and employers, and improved health services for students, among other things. The local school district and private funders were enthusiastic and committed to the project — which was why the Foundation was willing to invest so heavily in it. In November 2014, Oakland voters overwhelmingly approved a property tax that provided \$11 million a year to sustain the program for a decade, and student participation has climbed steadily. But as time went on, local priorities shifted, momentum waned, and the prominence of Linked Learning became more uncertain among the priorities of the school district, the county health agency, and local philanthropy.

FOR A PERPETUAL FOUNDATION, or one with a longer time horizon, these would have been setbacks, a cause for rethinking, or at worst a reason to try something different. For a time-limited institution making what it acknowledged were “final big bets,” these disappointments felt more unsettling. Yet, even as Atlantic was entering its final year, many of its other last-ditch policy initiatives were pressing on reasonably well through rough times and were showing precisely the kind of strategic flexibility that a long-term funder would have tried to support. In the best of these cases, the grantees’ determination to navigate a difficult environment was a ratification of Atlantic’s expressed preference for backing leaders and strong organizations, and then letting them lead — or, as Chris Oechsli had put it, “supporting people who we think are aligned, who have the values and capabilities to do the things that we aspire to see done,” and then letting go. The next few pages offer a closer look at two cases where projects to alter public policy ran into shifting currents, their leaders adapted, and the resulting changes kept the hope of continued progress alive.





LAUNCHING A NEW APPROACH TO DEMENTIA SERVICES

ONE EXAMPLE WAS IN IRELAND, where one of Atlantic’s larger GOAL investments amounted to more than \$17 million to help the country’s health system create a better way of treating people with dementia and reducing their need for institutional care. It was a joint effort by three key players: The Atlantic Philanthropies; a human-services innovation tank called Genio, a longtime Atlantic grantee; and the Irish government, particularly its Department of Health, which sets policy, and the Health Services Executive (HSE), which manages service delivery. In this partnership, Atlantic first gave Genio \$2.1 million to develop integrated, concentrated programs of care and services to help people with dementia remain with their families, and then granted nearly \$15 million to the HSE to cover a portion of the cost of implementing a new National Dementia Strategy, parts of which incorporated Genio’s approach.

The crucial fact about this partnership is that it was voluntary — that is, the government was not lured into a vision of overhauling dementia services merely because Atlantic wanted to fund part of it. On the contrary, as the eventual strategy statement pointed out, Ireland’s Program of Government, the official statement of government intentions, had promised as early as 2011 to develop a strategic response to rising rates of dementia. As the National Dementia Strategy noted, “The prospective aging of the Irish population will lead to an exponential increase in the number of people with dementia in the years ahead.”⁸ And that increase, under current practices, would lead to vastly greater demands on nursing homes and hospitals, imposing enormous cost on the system while delivering less effective, humane, and affordable treatment than would be feasible under a thoughtful reform. The government, in short, entered this partnership in its own best interests and those of its citizens. It sought and received Atlantic’s help to ensure that the most innovative parts of the strategy, once developed, could be field tested, evaluated, and expanded prudently, with the guidance of Ireland’s best clinical and practical minds.

GOAL investments amounted to more than \$17 million to help Ireland’s health system create a better way of treating people with dementia and reducing their need for institutional care.

YET ALTHOUGH the government came to adopt dementia as its own urgent priority, it had had plenty of help in reaching that decision. Its determination to develop and test a new strategy was at least partly a result of years of research, policy development, and advocacy funded by Atlantic. Foundation grants to the National University of Ireland, Galway, had long supported the influential work of Professor Eamon O'Shea, among the nation's preeminent policy experts on aging and dementia. Atlantic-funded policy research at Trinity College Dublin's School of Social Work led to persuasive writing by Professor Suzanne Cahill, another of Ireland's premier experts in the field. Other grants paid for sustained advocacy by the Alzheimer Society of Ireland and the Irish Hospice Foundation, among others. Earlier grants to Genio had helped create that organization and build its stature as the leading laboratory for improving services to people with mental illness, disabilities, and, ultimately, people with dementia. Irish health officials say that the gathering force of all these earlier Foundation grants helped strengthen the voice of reformers within the government and galvanized support for an all-out public commitment to improving dementia care.

In other words, Atlantic was both a facilitator and a stimulus to Ireland's National Dementia Strategy and to the National Dementia Office that was created to implement it. The Foundation's long history of working constructively with Irish governments on issues from early childhood to higher education to end-of-life provided a platform of trust on which to build a collaborative relationship. And the government's apparent enthusiasm made the odds of success on dementia seem good enough to warrant a major, final investment under GOAL.

However, the new strategy called for a sweeping, complex overhaul of the entire service delivery system, a difficult proposition for any government. A key part of the proposed changes was the creation of Intensive Home Care Packages — bundles of services coordinated to make it easier for families to care for their loved ones at home. While the idea of combining and coordinating services for each patient was not altogether new, the "intensive" model was designed to alter the prospects of needier patients who would otherwise be stuck in residential care facilities, at high cost to the state and with a badly reduced quality of life.

THIS WEAVING OF SERVICES from different agencies — public health nurses, home health aides, dementia specialists, and others — was complicated to arrange (because, among other things, they demanded that alien bureaucracies harmonize their different procedures case-by-case) and often costly to deliver (because patients’ needs were above average). Local staff needed training and practice to figure out how to relate to one another in complementary ways. In principle, both the complexity and the cost would eventually be worthwhile to the government, because the result would, on average, be less time spent in residential institutions — all while providing more effective and compassionate care. But in the short run, it became clear that the cost of these packages meant that only a relatively small number of the neediest patients could receive them. As a model for systemwide care, they might prove difficult to promote to cost-conscious executives and lawmakers.

The core insight of the Intensive Home Care Packages had been that family members are the anchors of most patients’ care. Families’ voluntary effort to look after their relatives with dementia would cost enormous sums to replace if the state were to pay professionals to do it all. Supporting voluntary efforts was therefore in the best interest of the state, the family, and the patient. But as the demonstration of Intensive Home Care Packages progressed, Genio and government health officials increasingly suspected that delivering a full, expensive suite of services to every family might not be necessary — and may not even be desirable. Introducing more flexibility into the model, they thought, might have the dual benefit of reducing cost and increasing effectiveness.

The Intensive Home Care Packages had unquestionably proved to be a marked improvement over the old practice of providing separate services, agency by agency, with no coordination. But they were turning out, in many cases, to be formulaic and driven by the procedures and available resources of the participating agencies. Typically, a patient or family would be allotted X amount of this service and Y of that, based on whatever was available from each respective program or organization, but not necessarily corresponding to what the family and patient most wanted or needed. Some packages provided too much service, at excessive cost, and others failed to provide some unconventional service that might have made the most difference to the family in question.

Supporting voluntary efforts was therefore

**IN THE BEST INTEREST OF THE
STATE, THE FAMILY, AND THE PATIENT.**

GENIO'S INSIGHT was that the real challenge was not just in delivering a package of services, but in selecting the *right* package for each family, and funding only the ones that were really needed. So, as the demonstration progressed, Genio began testing a more flexible coordination and tailoring of options, in which field staff could agree to provide service X instead of Y, add in A but not bother with B. This meant meeting at some length with the family, listening to their problems, working in teams, and exercising frontline judgment to construct a personalized suite of services that met the family's greatest needs at reasonable cost.

Again, this was not a radical new idea, but it was exceedingly tricky to get right. This discretionary mixing and matching did not come naturally or easily to many field personnel at first. It demanded a level of ingenuity, improvisation, and cooperation that is rare in any large system, public or private. Particularly in the health care system, where lives can be saved or lost based on decisions about care, workers found the idea of using their independent judgment in the selection of services disorienting at first. Genio's work in training, observing, and reviewing the implementation of the model was extensive, and it met some early resistance. But it plainly made a difference. The results of better-tailored care packages took little time to become visible, and staff teams at the demonstration sites, as they witnessed the improved condition of their clients, soon began to regard all the effort as highly valuable.

Done well, personalization of services can save money and enable a greatly improved quality of life. Done wrong, it could aggravate bureaucratic rivalries, frustrate already stressed families, put patients at greater risk, and drive costs upward. The difference between those two outcomes could not be determined by the Minister for Health or in the upper ranks of the Health Services Executive or through any policy diktat. They could be accomplished only with a major culture change at the front lines where service employees stand face to face with patients, family members, and other service providers. Still, if the changes in practice were going to be sustained, they would have to be encouraged, forcefully, by supervisors and policymakers. Hence the need for a cautious, carefully evaluated field test for the new model, with plenty of time to observe and make corrections, and with effective channels of communication for managers and policymakers to understand and absorb the results.

This painstaking, iterative process of designing, testing, and revising policy imposed a bundle of one-time, up-front costs, most of which lay outside existing health budgets. Even with the best of intentions, it would have been unlikely to be funded through normal procedures. Thus the importance of Atlantic's large GOAL contribution. From 2015 through 2017, with support from both Atlantic and the government, the new model underwent extensive testing in eight sites across Ireland, with Genio spending prolonged time in the field, working closely with service teams, with annual evaluations to assess progress and suggest adjustments.

THE PERIOD OF FIELD TESTING resulted in valuable insights — including many sobering lessons in the difficulty of making such a fundamental culture change happen across large systems. Although the final evaluation was still in preparation as this report was being written, several participants believed the efforts so far had been highly promising, though still imperfect. A longer process of organizational change, worker training, and cross-system consultations would almost certainly still be needed. Yet even with its imperfections, the initial work in the pilot sites resulted, as one participant put it, in “a paradigm change and a big improvement in care.” Genio and the service teams in the demonstration sites agreed that the proposed reforms could, in fact, ultimately deliver substantially better outcomes for little or no more than current budgets, provided the organizational, procedural, and bureaucratic obstacles can be overcome.

The immediate problem was that Atlantic’s support was now over, but the new model was not yet fully baked. Money for further refining, testing, and replicating were not immediately forthcoming from the government when the initial pilot phase ended, and public officials expressed varying degrees of hope that a dedicated source of money, earmarked for making the full Dementia Strategy a reality, might eventually become available. This was a situation, some observers argued, in which further philanthropy might have played an influential role — by keeping the issue prominent in public debates, enticing the government with matching grants, and continuing to publicize the opportunities and challenges that need to be faced. That, one person said, “is exactly the role Atlantic used to play here.” But by the end of 2018, Atlantic’s offices in Ireland were shuttered and sold, and the last of its staff had moved on. Other funders, meanwhile, had yet to show an interest in stepping into Atlantic’s shoes.

Nonetheless, it’s important to note that Atlantic’s influence on this field has not disappeared, but merely changed form. The largest of the Atlantic Fellows initiatives, the program for Equity in Brain Health, is housed partly at the Global Brain Health Institute at Trinity College Dublin, where Fellows will be prospective leaders in the field of dementia care and services. The presence of such a program in walking distance from the headquarters of Ireland’s Health Department, under a leadership team that includes many of Ireland’s most prominent voices for reform, may well have some of the same galvanizing effect that the Foundation itself would have exerted had it soldiered on another decade or two. The difference is that the Fellows in Brain Health will be deliberating, imagining, innovating, and ultimately leading, not just as funders, but as firsthand participants in the field — an influence that may prove to be even more forceful, over time, than large grants. If all goes as planned, their contribution to better care for people with dementia could continue to grow for many decades, long after The Atlantic Philanthropies has become just a chapter in the history of Irish civil society.

EXPANDING AND ENERGIZING THE AMERICAN ELECTORATE



AMONG THE BOLDER FOUNDATION actions in the GOAL years was the creation of the Civic Participation Action Fund, or CPAF, funded with a \$50 million grant from Atlantic funds that could legally be used for lobbying and electoral activity. CPAF is exempt from tax under Section 501(c)(4) of the U.S. Tax Code, which permits it to promote legislation and ballot measures and to spend money to influence elections — activities largely forbidden to most American nonprofits. (The full story of the creation of CPAF, including the source of its legal advantages, is told in the fifth report in this series, subtitled “2013-2014: Final Priorities,” beginning on p. 10.)

When CPAF set sail, in 2015, it seemed to be running with the wind. Atlantic’s efforts to improve American public policy on a host of issues — particularly immigration, criminal justice, health, retirement, and race — seemed to be gaining strength as the Obama administration, some congressional leaders, and many state governments took increasingly supportive positions. Atlantic created CPAF to spend the next five years backing promising policy and political movements aggressively — in fact, a good deal more aggressively than the Foundation itself had done for most of its history. At a time when so much momentum was building behind causes that were close to Atlantic’s heart, the Board decided not to sunset this portion of its philanthropy just yet, but to allow the 501(c)(4) operation to continue making grants a bit longer than the Foundation would, to join forces with other progressive funders, and to add fuel to the strongest engines of social change.

The new organization started off, in 2015 and 2016, with support for state and national campaigns to reform criminal justice, increase minimum wages, and expand Medicaid, among other things, as well as with voter registration and get-out-the-vote drives in key states. Many of these were causes in which other nonprofits were also heavily invested, with resources vastly greater than CPAF’s \$50 million. But the new fund’s special tax status meant that it could direct money to activities such as supporting campaigns for ballot measures and backing specific pieces of legislation, on which other nonprofits could not spend significant resources. One of its early grantees estimated that a dollar spent by CPAF was the equivalent of \$4 from another source, because of the greater expanse of political action that it could support.

BUT THEN CAME ELECTION NIGHT 2016, when the winds propelling CPAF's optimism abruptly shifted direction, and the map of promising opportunities shrunk swiftly and radically. Attacks on immigration, Medicaid, and other social programs had shown surprising strength with an electorate in which progressive forces were fractious and poorly motivated, but their opponents were driven and unified. Voter mobilization efforts among immigrants and people of color had yielded only middling results, while widespread efforts to suppress the votes of those same populations had proven reasonably successful.

Stephen McConnell, a former Atlantic Program Director who heads CPAF, and his co-director, Katherine Peck, concluded that progressive forces needed to do a better job of engaging and motivating their core constituencies, especially communities of color, starting at the state and local level. They and the CPAF board observed that every election year, donors had funded frantic get-out-the-vote efforts aimed mainly at pressing people to go to the polls — publicizing candidates and issues, running ads, reminding people when and where to vote, providing rides, and otherwise taking desperate measures to get bodies into voting booths. These sporadic, once-every-cycle mass offensives were important and necessary, but they plainly weren't enough. Among other things, they had done little to build any lasting ability for activists to keep interacting with voters, helping them understand why their vote matters, and organizing them to call their elected officials, sign petitions, join rallies, or otherwise take an active role in making sure their votes got the intended results.

Too rarely were the links between policy and personal well-being made vivid enough to change people's suspicion that policy battles and elections are a waste of time. Too little effort was expended on ensuring that voters could see the results of their vote, or enlisting them in civic action close to home and between elections, so they could learn the issues, meet candidates and public officials, and hold them accountable for the promises they make. If those things were done effectively, the next get-out-the-vote drive would surely be easier, more effective, and more inclusive. More important, the policies that were enacted in the meantime would be more likely to represent the voters' interests.

Of course, this would be a long undertaking, requiring a change in mindset for many funders who mainly concentrated on winning elections. Even partial success would take longer than CPAF was expecting to exist, given that it was set up to last only until 2020. But a shorter-term goal, perhaps within CPAF's grasp, would be to find like-minded funders (or persuade some who aren't yet like-minded) to support local organizations that propel advocacy and voter mobilization built on long-term civic engagement.

THE IDEA was not completely new, and certainly not unique to CPAF’s board and executives. Civic engagement organizations were already at work in the field, and many of them could benefit from some concerted financial and moral support. But compared with the major national think tanks and political groups, these organizations were more local, often based in particular ethnic or racial constituencies, and thus less visible to big national funders. Still, that was an obstacle that could be overcome.

One early signal that citizen engagement would be a productive mission for CPAF — in addition to its support for advancing progressive policies and ballot measures — had been in its initial efforts to support reformers in several District Attorney races. At the time, those grants were part of a more general push for criminal justice reform as an issue, and these DA candidates were leading reformers. But it became clear, both from the success of those efforts and from the dynamics on the ground during the campaign, that mobilizing voters around elections for chief prosecutors had a different effect from the typical get-out-the-vote drive. Candidates for District Attorney tend not to run personality campaigns; they run on issues, and often on cases or causes that can be told as stories, made plain and compelling. They invite voters to vote not for a beguiling individual, but for a definable *outcome*.

The lesson wasn’t that CPAF should stick to DA races (which it has not done). The lesson was that the techniques of mobilization in those races could be applied to other issues and offices. It was a *style of politics* that made it more likely that voters would not merely vote for someone, but could be organized to hold that someone accountable for performing in office as promised. Local races and referenda were especially ripe for this kind of approach, because voters were more likely to notice what local officeholders ultimately do and what results local ballot initiatives generate.

THEY INVITE VOTERS TO VOTE
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THAT APPROACH to voter engagement might be especially effective in states and localities where large communities had been successfully dissuaded from casting ballots, either because of deliberate voter suppression or because the political establishment had simply overlooked them. For example, people who have been relegated to minority status in gerrymandered districts may have concluded that their votes didn't matter, and thus may have turned cynical or indifferent. Yet those lost votes, if properly motivated, would still be highly valuable in statewide or non-legislative races. Inspire a Latin nonvoter in Arizona or Florida, or an African-American nonvoter in Georgia or North Carolina, to become more active in state and local politics, and odds are that same voter will also be more inclined to go to the polls when the races are national. In those jurisdictions, even small changes among communities of disaffected voters could, in principle, swing elections.

For members of the CPAF board, 2016 ended with considerable deliberation and scanning of the landscape, grappling with these observations and hypotheses and thinking about how they could be translated into a new approach to the organization's mission. At their behest, Mr. McConnell and Ms. Peck set about delving into the civic engagement landscape of a handful of crucial states, trying to learn as much as possible about the environment and make informed, genuinely helpful contributions. They and the board zeroed in on states where people of color were underrepresented in policy debates and on the voter rolls, where legislative and political outcomes were not overly determined in favor of one party, where the landscape was not flooded with money, and where credible civic engagement efforts were already underway, even if on a small scale.

They ended up concentrating on Arizona, Florida, Virginia, Georgia, and New Mexico. Their goals were to build the strength and effectiveness of civic-engagement forces, multiply the resources devoted to organizations in communities of color, and win ballot measures, legislative fights, and elections. And central to the whole challenge was to work with roundtables of 501(c)(4) funders in each state to build awareness, coordinate effort, and build enthusiasm for the civic engagement agenda. Coordinating with the more traditional nonprofit funders was also a priority, because although those organizations cannot engage in partisan elections, they have a major stake in educating the public on issues, ensuring that people take part in community forums, and helping them connect policy developments with their own lives.

MR. MCCONNELL AND MS. PECK spent extended periods on site in each of the targeted states, visiting organizations, meeting leaders and funders, learning about challenges and opportunities, and laying the groundwork for upcoming policy and political battles and their aftermath. They devoted effort to helping local voter-engagement groups recruit strong leaders with solid political and organizing experience. CPAF funded early canvassing efforts, well before the autumn elections, and explored ways of better using data and digital resources, an area in which many local organizations are still weak. And it began to help frontline organizations tell their stories more concretely and persuasively, so potential donors could understand what they did, why it mattered, and how much more of a difference they could make in the future.

These efforts showed enormous success in Virginia in 2017 and continued all the way through the 2018 midterm national elections. The morning after those elections, substantial gains were visible in each of the targeted states, along with some disappointments. Most obviously, the outcomes of gubernatorial races in Florida and Georgia were dispiriting, and even many down-ballot elections in Florida fell short of expectations. Yet patterns of voter turnout showed demonstrable progress and suggested that a platform may now exist on which to build greater participation in future policy debates and elections. Statewide races in Arizona and legislative races in Georgia produced big wins, as did many critical campaigns in Virginia and New Mexico. It was a strong indication that the strategy was working, though it would take more time to jell and would need to navigate a few more election cycles to see if the results were durable.

CPAF, by design, will not survive long enough to take part in much of that future planning, coalescing, and testing. Its closing is set for June 2020 — 18 weeks before the next national Election Day. By then, however, it will already have made critically important grants to voter-engagement organizations in key states, intended to fuel them through the whole campaign. The organization will have helped recruit and train talent in many places where CPAF has worked — people who will play a role in this election cycle and beyond and may apply that experience to an even greater contribution in building constituencies for the future. And its staff and allies will have worked closely with donor groups in each state, as well as nationally, to support and encourage their continued commitment to the cause beyond 2020. Already, financial support for these efforts is building, with roundtables of donors in CPAF's priority states showing encouraging signs of carrying on the fight, and with two national funding organizations — Way to Win and the Movement Voter Project — playing an increasingly prominent role.

STILL, at a moment of historic flux in American politics, when the nation faces fundamental challenges to virtually all of Atlantic’s most important priorities and values, the disappearance of CPAF seems especially untimely. Just as the organization has formulated a strategy that takes full account of the new American political reality, and just as that strategy is showing real promise, it will have to be left to others to pursue and expand — if they choose to do so. That makes for an exceptionally tenuous note on which to exit the stage.

From Atlantic’s perspective, however, that is what it means to be a time-limited institution. There will likely never be a moment of complete tranquility in American politics, when it would be easy for a funder to declare victory and forgo any further concern about public affairs. Any foundation that plans to end its life will find itself ending at an inopportune moment of one sort or another. It will, like Atlantic, necessarily be entrusting its best ideas and greatest hopes to a later generation of funders, who may see things in similar ways — or may not. Perhaps it is enough, as Chris Oechsli wrote in 2015, for Atlantic to have made “large, purposeful philanthropic investments *now*,” and to have given everything it had to finding solutions to the problems of today.

For now, CPAF at least hopes to be able to conclude with evidence that more resources have been drawn to the field of civic engagement, that frontline organizations are stronger and more effectively led, and that a clearer, more compelling argument has been built around the importance of this approach and its potential for the future. And, of course, it hopes to leave the field having clinched a few more policy and electoral victories — even if there will no longer be a CPAF office in which to follow the news on Election Night. ■

Any foundation that plans to end its life will find itself ending at an inopportune moment of one sort or another.



IV.

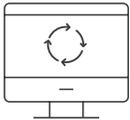
COMMUNICATIONS: THE STORY CONTINUES, THE NARRATOR DEPARTS

■ **EVERY FEW MONTHS** from 2017 through 2019, a print mailing list of some 3,600 people received another volume in a series of reports summing up Atlantic’s final reflections on its work. One set of full-color publications detailed the Foundation’s experiences in each of the six countries where it worked outside the United States. Another, called “Atlantic Insights,” described how its Board and staff had applied various philanthropic techniques or principles to its grantmaking. The “Insights” books covered topics such as operating on a limited life, conducting effective advocacy programs, working in partnership with governments, funding strategic litigation, and investing in capital projects. Both sets of documents were meant, first of all, to be useful to emerging donors who might be looking for ways to pursue their philanthropic interests or to organize their grantmaking. But the stories and reflections in these reports were also designed to appeal to just about any reader curious about what Atlantic had done, why it took this or that course of action, what it learned from the experience, and, on occasion, what it might wish it had done differently. (A fuller description and history of these publications is in the previous report in this series, subtitled “2014-2016: Finished, But Not Done,” pp. 36-38.)

A ‘FUTURE-PROOF’ HOME ON THE WEB

BESIDES BEING DISTRIBUTED in hard copy, the country books and “Insights” also formed the narrative core of the website that will represent The Atlantic Philanthropies after it’s gone. In 2018 alone, the publications were downloaded from the web more than 14,000 times — a distribution close to four times the size of the print circulation. Users also showed continued interest in other books and resources on the site, including evaluations, blog posts, strategy reports, and historical data on grants. Despite the widely publicized announcement of its final grant allocations, Atlantic evidently still was drawing the interest of a substantial number of people who follow philanthropy. Still, overall traffic declined throughout 2017-18, after several years of intense use.

The dropoff was partly to be expected. Once the years of decision-making about final grants were over, there wasn’t much news, beyond publication of the country and “Insight” books, to drive readers to the site. The Foundation had tapered its once-active social media and email outreach, which had also boosted traffic. But just as important, another reason for declining visits to atlanticphilanthropies.org was that the major work of the Foundation in 2017 and 2018 — the creation of the Atlantic Fellows programs — was increasingly to be found elsewhere, on a dedicated, new website, atlanticfellows.org.



DURING THOSE YEARS, the attention of Chief Communications Officer Elizabeth Cahill and her colleague Jacqueline Waters had started shifting more and more from completion and maintenance of the Foundation site toward the development and testing of the new one covering the Atlantic Fellows. Meanwhile, formal ownership of what was now being called the Atlantic Philanthropies “legacy” website passed in 2018 to Cornell University, where the Foundation’s archives are also housed. Several tasks remained for the Foundation to complete on the legacy site before it relinquishes control in 2020, including a review of all the content to ensure that it’s up to date and compete, and a final uploading of all the historical grant records so that researchers can download them easily.

As the adoptive host of the Foundation’s website, Cornell’s archives — and particularly the dedicated archivist for the Atlantic material — will be responsible for keeping the site in working order and perhaps adding information or features to help visitors use it to search for and read archival records. To make sure that the website would be easy for the archivists to use and maintain, Ms. Waters and consultants took steps well before the handoff to Cornell to keep the architecture simple and, to the extent possible, see that it was “future-proofed” against foreseeable changes in technology or user needs.

To achieve these goals, the website is built on a popular and easy-to-use content-management system, the open-source software WordPress. (WordPress is also the backbone of the official websites for Microsoft, the White House, and the Rolling Stones, along with more than one-third of all other sites on the internet.⁹) WordPress’ content-management system allows users who aren’t computer professionals to design and amend sites on their own, applying only the features they need, and adding others later if needs change. A prime virtue of being “open-source” is that thousands of people around the world are constantly maintaining and improving WordPress, essentially for free, so that the software will likely evolve with the internet. Atlantic’s website should be able to float on top of whatever future modifications may be necessary to keep WordPress current.

The most important planned change to the website will be the addition of a portal through which researchers can enter Cornell’s digital repository of Atlantic documents. That feature, still under development in 2019, would make the Atlantic archive a resource for anyone studying the Foundation, its causes and grantees, or its lessons for philanthropy, anywhere in the world.



AN ACTIVE ARCHIVE

IN THE PREVIOUS FEW YEARS, the Foundation had been seeking ways of contributing, even after its departure, to longer-term conversations about social change and Giving While Living, including by making its archive an attractive resource for people who might be thinking and writing about these issues. One approach to that challenge had been to sponsor “active curation” by four organizations that produce thoughtful information about philanthropy. These included the philanthropic advisory firms Bridgespan and Rockefeller Philanthropy Advisors (RPA), the business-innovation magazine Fast Company, and the Digital Repository of Ireland, the online treasury of Irish social and cultural heritage.

Atlantic’s support for these institutions helped them produce interesting, sometimes important, new work, including research on foundation “big bets for social change” by Bridgespan, and on time-limited giving by RPA. Fast Company created a special ongoing feature dedicated to philanthropy, and the Digital Repository began collecting oral histories and other artifacts of Atlantic’s historic, decades-long contribution to Irish civil society.

Except for the Irish effort, which includes full access to Atlantic’s Ireland-related documents and data, the other active-curation projects made only passing use of the archives. As Atlantic executives see it, the projects turned out valuable contributions to thinking and writing about philanthropy, which was their primary purpose, and thus were well worth the investment. But they involved more “curation” of Atlantic’s ideas, experiences, and values than of its stash of records and data. It’s still possible that an enriched discussion, stimulated by the active curators’ publications, will encourage other researchers to explore the archive, where a substantial trove of data, analysis, and reporting on grant results was being prepared for wider use as the active curators were starting their work.

The archive had begun receiving shipments of Atlantic documents in late 2016, with larger tranches from around the world arriving periodically throughout the following year. These included hundreds of cubic feet of hard-copy publications, memos, reports, evaluations, strategy and briefing papers, and other records of the Foundation’s thinking, planning, analyzing, managing, and decision-making. Other documents, already in digital form, were likewise being transferred in throughout 2017 and early 2018. As this was happening, the new (and not yet fully staffed) Atlantic archive team needed to examine what had arrived, broadly classify it by type and subject, start digitizing the most important hard-copy documents, sort out material whose content was or might be restricted, and set priorities for which documents should be dealt with first.

AS A ROUGH FIRST STANDARD, the archivists and Atlantic agreed that among the first documents prepared for public access ought to be on the topics of widest interest among researchers and philanthropists. These had to do with the Foundation’s “why and how” — its strategy papers, Board memos, internal evaluations and updates, and any other documents that shed light on how Atlantic made its choices and how it adjusted course along the way. Equally important would be items related to its limited lifespan: documents discussing Giving While Living, time-limited philanthropy, and the timing of grantmaking and grant-ending. Other material, including general research, governance and financial matters, administration, and grant reporting, could be left for later, and many hard-copy documents could be left to be digitized only on demand.

An Advisory Council, established in 2017, would help the archivists sort through these judgments, setting priorities, and establishing or clarifying rules about handling sensitive material. The Council was set to continue its work through 2020, by which time the open questions were expected to be largely resolved.

The whole process of sorting, cataloguing, digitizing, and preparing documents to be made public is expected to take at least until sometime in 2019, with more years of further refinement after the Foundation hands over its last official business records in 2020. At around the same time, the Archives will open parts of the collection, with a “finding aid” to help online users sort through the available material for the items they want.

One rich source of information on Atlantic’s inner workings — and on aspects of its thinking and actions that were not necessarily put in writing — is an oral history compiled by Columbia University’s Center for Oral History Research. A parallel project, by communications consultant Thaler Pekar, produced videos featuring many of the same people. The videos were intended mainly to give staff an opportunity to reflect on and celebrate their work, but they also offer researchers an intimate, face-to-face encounter with Foundation personnel as they recall their time at Atlantic. The hundreds of interviews in the two projects offer a window into the real experience of a limited-life philanthropy that documents alone could never convey. Atlantic Board and staff members, executives, advisors, grantees, and close observers all offer personal, often unvarnished memories of the Foundation’s history and assess its work.

Hundreds of oral history interviews offer a window into the real experience of a limited-life philanthropy

**THAT DOCUMENTS ALONE
COULD NEVER CONVEY.**

MANY OF THE INTERVIEWS were conducted on the express understanding that they would be held in confidence until 2018, so that they would not be publicly available while the Foundation was still in active operation. However, the free, open-ended nature of the conversations sometimes led respondents to disclose personal or otherwise sensitive information, with comments that might prove to be more provocative than intended even after 2018, or that reveal private or privileged matters that should not be public at any time. These will have to be redacted, or access to some of them restricted, before the interviews can be made public. Columbia transferred the recordings and transcripts to Cornell in January 2018, and they are expected to become available for research in 2025.

As managers of Atlantic’s website, archivists intend to keep it as alive and up to date as possible. They expect to continue uploading important new information as it becomes available, including any new research and writing by the active-curation partners, or incoming reports from GOAL grantees, or late-breaking evaluations. Links to communications from the Atlantic Institute, the Atlantic Fellows programs, and other major grantees will also appear at atlanticphilanthropies.org, thus ensuring that the site will remain at least reasonably fresh for a few more years.

For the great majority of users who will not travel to Cornell’s Ithaca, New York, campus, atlanticphilanthropies.org will also be the primary port of entry to the archive. That means that the website will need to be kept active for longer than might be expected if it were only a source of current information for the public. Widespread public use of the site might be expected to trail off after just a couple of years, but researchers and emerging philanthropists might have use for archival information for a good deal longer than that. For now, Cornell plans to keep the website live and up to date through at least 2025. The Advisory Council will then determine whether user interest justifies a longer life.

In early 2019, as Ms. Cahill was preparing to leave her Atlantic position before year’s end, she was still shepherding a few last publications into print and eventual addition to the website. Chief among these was a statistical synopsis of Atlantic’s life and accomplishments — a compendium of data and commentary by Forbes editor Steven Bertoni, tentatively called “Zero is the Hero,” expected to be published in the summer. The final overall content review of the website, expected around midyear, might prompt a few other last-minute changes or additions. But after that, once she has departed, Ms. Cahill expects management of the legacy site to pass fully to Cornell. The Foundation will have little more to do with it until sometime in 2020, when Mr. Oechsli, in Atlantic’s final weeks, writes a valedictory message that will constitute the institution’s final posting.



PRESENTING THE ATLANTIC FELLOWS: 'DESIGNING A SHARED UNDERSTANDING'

THE CREATION OF THE ATLANTIC FELLOWS PROGRAMS — and especially the establishment of the Atlantic Institute, with its mission of forging an international community of Fellows — set in motion an intensive three-year project to fashion a single, unifying identity for the whole worldwide network. As with any exercise in establishing a corporate identity, the work included all the traditional communications challenges: creating a set of common visual elements — logos, design templates, website, stationery, brochures, and video and publication guidelines — as well as consistent ways of speaking and writing about the program and what it stands for. But the issues ranged well beyond communications alone. An internal planning document described the task as “designing a shared understanding of the Atlantic Fellows programs and Atlantic Institute, creating a common visual identity and materials, establishing common in-program experiences (curriculum and other special moments), convenings, and ongoing support and interaction among the programs and Fellows.¹⁰”

In short, “identity” in this case meant much more than just the design and stylistic conventions normally associated with corporate image-making. For the Atlantic Fellows, the goal included harmonizing, throughout the network, the essence of what it means to be an Atlantic Fellow. That essential meaning should be manifest, for example, as soon as Fellows enter the program and again, even more so, when they graduate as Senior Fellows and their sense of belonging expands from their individual program to the worldwide community. The creation of common induction elements for each new cohort of Fellows and the adoption of rituals for graduation into the global community of Atlantic Fellows are all meant to instill the core idea of the fellowship in all participants from the start to the end of their active participation. From there on, the mission is to welcome them into a lifelong identity as an Atlantic Fellow. The idea of being a Fellow should be recognizable everywhere, across programs, disciplines, and regions.

That can’t be done only with logos and design templates; it has to be embedded in the way people participate in the program and the way they think about their future as Senior Fellows when they graduate. That explains the references, in the identity plan, to “in-program experiences” “curriculum,” and “convenings” — all of which deal with integral parts of the fellowship, not only with image. Because Atlantic considers the formation of a global community of Fellows a fundamental goal of the program — and because it wants that community to be readily recognizable as a single identity to everyone who encounters it — it was essential to codify some elements that all the programs should have in common, and to project that commonality in every way possible, both in form and in substance.

SOME OF THAT CHALLENGE required Atlantic’s whole program team — including CEO Chris Oechsli, Chief Strategy Officer Ben King, and Chief Communications Officer Elizabeth Cahill and her consultants — to work with each individual program and the Atlantic Institute as it took shape, planned its curriculum and activities, and enrolled its first few cohorts of Fellows. This was a formidable undertaking: It meant making elements of the experience, the essential nature of the fellowship, at least somewhat consistent for a social scientist at the London School of Economics, a campaigner for Indigenous rights in Australia, and a neurologist or social worker at the Global Brain Health Institute — despite the widely differing nature of their activities, specialties, and interests.

As programs progressed from concept to implementation, differences naturally arose between program leaders, keen to stake out a unique profile that would set them apart, and Atlantic executives, who hoped to incorporate that uniqueness into a harmonious universal phenomenon. For programs with a geographic focus, particularly those in Southeast Asia, South Africa, and Australia, leaders argued persuasively that their identity and experience needed to be rooted in local culture and needs, and not come across as homogenized or alien. That, too, made for some sensitive negotiations over how to ensure that programs are distinctive and authentic while nonetheless encompassing them in a multidisciplinary, multicultural, worldwide whole.

These issues took some years to work through, and a few remain at least partly unresolved as this is written. They may never disappear altogether — tensions along these lines could well surface now and then as programs mature and evolve. Dealing with those natural tensions, while preserving a center of gravity and a cohesive identity that binds all the programs and Fellows together, will be the job of the Atlantic Institute, the one physical and organizational manifestation of Atlantic’s global vision. Launching that vision in a way that is clear and attractive from the outset was a responsibility that has fallen mainly on the Institute’s Executive Director, Penelope Brook, on her governing board, and on two critical staff positions that she filled in 2018: the directors of program and communication.

In both cases, as it happens, the choice was a Senior Fellow, a recent graduate of one of the fellowship programs. The new Program Director, Evie O’Brien, is an educator and scholar from New Zealand who had recently completed her fellowship in Social Equity at the University of Melbourne. The Communications Director, Fionnuala Sweeney, had been a news anchor and correspondent for CNN International before being selected as an Atlantic Fellow for Equity in Brain Health at Trinity College Dublin. Both women’s paths to Oxford perfectly exemplified the idea of a worldwide corps of Atlantic Fellows: Both had distinguished careers as individual leaders, followed by immersion in a multidisciplinary cohort of Atlantic Fellows, and then a further step into the global community as active members. Each would now be responsible, with Dr. Brook, for a critical aspect of the Institute’s mission, which the Atlantic Fellows website sums up as “Seven programs. One common purpose.”

THE CHALLENGE OF CONJURING a distinctive, vivid identity for the international community would fall mostly to Ms. Sweeney, whose job is to oversee central communications for the entire network. As an international television journalist, Ms. Sweeney has taken swift ownership of the global megaphone that the Atlantic Institute represents. Her first step was to find relatively quick ways of demonstrating what a global communications office could do for the individual programs. She started by creating products the program leaders and Fellows would value. For example, in her first several months on the job, she launched a podcast called “Atlantic Fellows Conversations,” a series of five- to 15-minute discussions, each with a single Fellow describing her or his field, career, aspirations, and experience as an Atlantic Fellow. The podcasts are consistent in tone and style regardless of the topic, thus reinforcing the global consistency of the fellowships. But they focus concretely on individuals and their experiences in the program, thus helping to burnish the public image of each individual fellowship as well.

The message of these early services has been, to borrow a 1990s credit-card slogan, that “membership has its privileges.” Belonging to the global Atlantic Fellows community is not only a way to network and meet people from other fields and regions (which, for many Fellows, might be attractive enough by itself), but also a way to present your cause and ideas to a larger audience. As Elizabeth Cahill sees it, the podcast series “is building goodwill with all the programs, because first of all, it’s an experience that’s helpful to the Fellows themselves. It’s built-in media training, in a way. Second, each one produces a nice public item that Fellows and the programs can use to promote their work. And third, on a global level, it authentically tells the stories of who Atlantic Fellows are,” by attaching real faces and voices to something that the world is encountering for the first time.

Beyond discrete products and services to the programs, designed to support a shared Atlantic Fellows experience and identity, the Communication Director also ensures that Fellows around the world are aware of what’s happening across the whole Atlantic Fellows landscape. For that purpose, besides the website and the podcasts, the Institute has created an e-newsletter and an intranet called the Hub, where, among other things, Fellows can search one another’s profiles, learn about the activities going on in other programs, and possibly seek people working on projects that overlap with their own. Annual announcements publicize each year’s new cohort of Fellows, and videos and other information products about the global community and Atlantic Institute are created for each of the large gatherings where Fellows come together from around the world.

Belonging to the global Atlantic Fellows community is not only a way to network and meet people from other fields and regions, but also a way to present your cause and ideas to a larger audience.

GIVEN THE EARLY UNCERTAINTY among program directors about the role of the Atlantic Institute, this quick, creative burst of helpful communications may prove to be a useful way of crystallizing the idea that the Institute is servant, not master, and that its cohesive efforts are a benefit to the seven programs, not a burden. Most important, as Ms. Cahill notes, the stream of early communications projects has helped to move the focus away from the mechanics of branding rules and norms and instead focus it on the actual drama of Fellows' lives and work. "Sure, the visual identity, the consistent messaging, that's all hugely important" she says. "But identity is much more than that. Identity is the stories we tell ourselves. And it's the Fellows who embody that. They are the identity of this, moving forward."



THE STORY BEHIND THE STORY

AS THE ATLANTIC PHILANTHROPIES cedes the spotlight to the Atlantic Fellows, one narrative thread that unites them both continues to draw widespread attention and admiration: the personal journey of Chuck Feeney and what Harvey Dale, Atlantic's first CEO, described as his "act of generosity probably unique in the history of the world." Mr. Feeney's irrevocable gift to the Foundation of nearly his entire personal fortune continues to stun those who learn of it. It has likely sparked many billions of dollars in other people's charity, not least by having inspired Bill and Melinda Gates and Warren Buffet to form the Giving Pledge, a group of the world's wealthiest donors who have promised to dedicate the majority of their wealth to social causes. "He is my hero," Mr. Buffett told a gathering at Forbes magazine in 2014. "He should be everybody's hero."

The other element of Mr. Feeney's philanthropic history that continues to attract attention is his decision to see all his charitable wealth given away during his lifetime. The announcement of Atlantic's last grant allocations in 2016 — with the final sums set aside for eventual launch of the Atlantic Fellows — means that Mr. Feeney, 88 as this is written, has indeed lived to see his money fully put to use. When it is formally dissolved in 2020, the Foundation he created will be the largest charitable institution ever to bring itself to an intentional end.

ALTHOUGH MR. FEENEY may not have coined the phrase “giving while living,” it has become virtually a personal trademark, so closely identified with him that a Google search for the phrase turns up dozens of references to him for every mention of anyone else. The phrase is by now much more than a description of Chuck Feeney’s personal desire to see the results of his charity firsthand. It is now the cornerstone of a growing school of thought in American philanthropy, a belief that perpetual foundations should not be the default model for large-scale giving — and, in some critics’ opinion, may not be a preferable model at all. Mr. Feeney never argued that his own approach was the right one for all or even most other foundations, though he plainly considered it more rewarding for the donor and perhaps more productive in solving near-term problems. However, a few early 20th-century philanthropists, notably Andrew Carnegie and Julius Rosenwald, did make forceful arguments that foundations ought to be time-limited, preferably within the lifetime of the donor.

But it was not until Chuck Feeney’s story, nearly a century later, that the Carnegie-Rosenwald philosophy had a modern-day hero on a grand scale. (Even Mr. Carnegie ultimately proved to be an imperfect exemplar of his own argument. Unlike Mr. Rosenwald and Mr. Feeney, he ended up vesting large sums in perpetual foundations.) Being the public face of a philanthropic movement might seem an odd role for the publicity-shy Chuck Feeney, who for most of his life insisted that his Foundation operate in secret (even the vague name “Atlantic” was chosen to deflect attention). But once the existence of his Foundation became public, and the extraordinary history of its creation and planned conclusion became better known, international attention was nearly impossible to avoid. In his later years, Mr. Feeney has embraced the publicity a bit more, and has particularly welcomed the public discussion of time-limited philanthropy as an appealing way to approach charitable giving — and maybe a more effective one.

It is therefore no coincidence that two of Atlantic’s final “Insight” reports draw attention to fixed-term giving. One focuses on donors, and on the satisfactions of giving during one’s lifetime. The other deals with the management, financial, and strategic aspects of operating a foundation on a limited timetable. Both are, in essence, summations of the story of Chuck Feeney and the \$8 billion institution he started, led, and ended.

“I’ve taken a great pleasure,” Elizabeth Cahill said in a 2019 interview, “in contributing to getting Chuck’s story and the impact of his philanthropy out there. It gives me joy to see media continuing to report on his story, which continues to fascinate and inspire so many people. I’ve gotten to do a lot of great things in my time at Atlantic. But that’s one that I feel most privileged to have been able to do.” ■

■ **ONE MORNING** in the autumn of 2020, if all goes as planned, Atlantic’s Board of Directors will meet in San Francisco with Chuck Feeney to commence the liquidation of The Atlantic Philanthropies. Earlier that year, the Foundation will already have made the last in what will likely be some \$300 million in payments on previously approved grants. The Board will have established a reserve account to cover any unforeseen liabilities or other obligations for some period after the Foundation closes. The lease on Atlantic’s lower Manhattan headquarters having been surrendered in late 2018, its final, temporary space in Rockefeller Center will be emptying out for good. Most of the Foundation’s remaining employees, numbering between six and nine at the start of 2020, will have received their severance payments and departed. Only Chris Oechsli, Executive Assistant MaryAnn Neddill, and Chief Financial Officer David Walsh will remain, with Mr. Walsh transitioning to occasional consultant status by year’s end. Grantees with reports still outstanding will have been told to submit them to the Atlantic Archives.

Most important, well before the autumn meeting, the Board will have decided on permanent funding for all the Atlantic Fellows programs and the Atlantic Institute. The Equity Initiative in Southeast Asia was the first of these to be approved, at the end of 2018. The Brain Health fellowship was approved in June 2019, and the Atlantic Institute and the program for Health Equity at George Washington University were both approved four months later. The remaining programs will be reviewed in March 2020 and all final decisions are planned to be made before or at the Board’s June 2020 meeting.

Then, when they meet in the fall, the Atlantic Directors will decide on the disposition of any remaining grant funds and appoint an official liquidator, most likely Mr. Oechsli, to carry out the final steps in distributing the last of the money and dissolving The Atlantic Foundation, the core charity in the Atlantic Philanthropies family. In that capacity, perhaps retaining some former staff members as consultants, he will complete the required public notifications and filings for dissolving the institution. In December, the Board will again meet — briefly and by telephone — to confirm the final resolutions. Mr. Oechsli will then notify the Companies Registrar in Bermuda, where the Foundation is incorporated, that the liquidations are complete, and Cornell will post a notice on the Atlantic website confirming that the institution is no more.

EVEN THEN, however, a legal remnant of Atlantic will continue for a few more years. One or two Residual Trusts will discharge any remaining responsibilities, including providing informal guidance to the Atlantic Institute and Atlantic Fellows programs; handling any unexpected business, managing and distributing the small amount of reserve funds to the pre-determined recipients; and providing for health care and other needs of Founding Chairman Chuck Feeney and his wife, Helga. But these will be comparatively small entities with narrowly circumscribed, mostly administrative tasks. The core activities of a grantmaking institution will have ended on schedule, as Mr. Feeney intended.

The final question, no doubt, will be about legacy — a question that Atlantic's first CEO, Harvey Dale, had warned from the outset could be answered only through the long lens of history. Still, even as early as 2020, a few achievements will almost certainly qualify as enduring legacies. The monumental Cornell Tech campus on New York City's Roosevelt Island, for which Atlantic provided the seminal \$350 million grant, has not only transformed that island and raised Cornell's profile in global technology, but provided a substantial boost to New York's ambitions as a capital of the tech industry. The Program for Research in Third-Level Institutions, a partnership between Atlantic and the Irish Government, revolutionized that country's support for advanced research and likely fueled part of the surge in its knowledge economy. Atlantic's \$177 million contribution helped spark more than a billion dollars in government support for university research centers across Ireland.

Atlantic support of advocates in South Africa and, later, in Ireland materially contributed to the recognition of same-sex marriages in both those countries. Years of patient grantmaking, totaling nearly \$270 million, propelled a primary health care reform movement in Viet Nam, still ongoing, in which the government was a full partner. Nearly \$650 million in grants to the University of California, San Francisco, added huge capacity to that university's cluster of world-leading research and health care institutions. And similar streams of large grants helped elevate the stature of universities in nearly every other country where Atlantic worked.

But beyond those clear victories, the great majority of the Foundation's \$8 billion in aggregate grants awaits, at best, the judgment of a later day. Will Atlantic's \$62 million in support for organizations opposing the death penalty someday lead to a permanent reduction, or even the abolition, of executions in the United States? Will its \$37 million investment in integrated and shared education in Northern Ireland — where Catholic and Protestant children spend at least parts of their school day learning and playing together — lead to more intermingling of those long-divided populations, and ultimately promote greater understanding and tolerance? Will Atlantic's \$17 million contribution to dementia policy in Ireland pave the way to a complete, nationwide system of care and support? Will its tens of millions in grants for the international defense of the rights of migrants and refugees lead, someday, to more just and humane treatment of displaced people?

EVEN IF THE ANSWERS to these and other questions ultimately seem to be Yes, how could anyone know for certain? With so many other influences impinging on American attitudes toward the death penalty, on sectarian tensions in Northern Ireland, on worldwide migration, and on dozens of other causes in which Atlantic invested heavily, is it likely that any one foundation's contribution could someday be confidently weighed and found to be decisive? For most of philanthropy most of the time, "legacy" is like the proverbial tree falling in an empty forest: real, probably thunderous, but unperceived and thus unknowable.

Fittingly, Atlantic spent most of its history averting its eyes from the big, distracting, inscrutable questions of legacy, and focused instead on concrete steps toward clearly defined ends. Some of those ends were achieved, some not, but most of them were understood to be milestones along a journey, not final destinations. Only in its last episode has the Foundation aimed, deliberately and expressly, at cementing a legacy: the Atlantic Fellows. In this case, to be sure, the intended legacy is not necessarily an end to the death penalty or racial and sectarian tensions or disparities in health and economic opportunity, or any other specific social problem in which a multitude of factors play a part. Instead, the legacy of the Atlantic Fellows is to be the Fellows themselves — their vision and energies, the opportunities they seize, the people they inspire, the strides they make, in whatever field and in whatever way, beyond any possible predicting by the Foundation that gave them its support.

This is an aspiration with venerable roots in modern foundation history. Mitchell Sviridoff, a pioneer of social-change philanthropy as Vice President of the Ford Foundation in the 1960s and '70s, once told a group of Ford program officers and junior staff: "All successful grants are investments in people. So are some unsuccessful ones — not everyone lives up to expectations. But every success depends on someone who has an idea, gets it done, and turns it into something bigger than one project. Back that person, and you've got a chance of making a difference. ... Good ideas don't necessarily make good grants. Good people do."¹¹ As the culmination of its 35 years of philanthropy, Atlantic has wrapped up its work with that elemental insight, distilling its whole history into one final investment in the promise of human talent.

"In the end," Chuck Feeney has said, summing up a lifetime of giving away everything, "it's all about people." In its own end, using all that remains of his fortune, his Foundation will also have been about people. And that is the last and longest gift it will bequeath to history. ■

**"IN THE END, IT'S ALL
ABOUT PEOPLE."**

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- ¹ Christopher G. Oechsli, "Ending Well: Maximizing Lasting Impact," blog post, Sept. 29, 2015, at www.atlanticphilanthropies.org/news/ending-well-maximizing-lasting-impact
- ² "The Atlantic Philanthropies Announces Full Cohort of Atlantic Fellows," News Release, July 24, 2018, at <https://www.atlanticfellows.org/news/2018/7/19/announcing-the-first-global-cohort-of-atlantic-fellows>.
- ³ Atlantic Philanthropies Senior Leadership Team, "July 17-19 Atlantic Fellows Program Oxford Convening Read-Out," unpublished memorandum to the Atlantic Fellows Program Executive Directors, August 8, 2018, p. 2.
- ⁴ "Atlantic Fellows Program Charter," revised draft version, Sept. 25, 2018, p. 8, as presented in the docket book for the Atlantic Philanthropies Board of Directors meeting of October 21-23, 2018.
- ⁵ Institute for Voluntary Action Research, "Early Thoughts and Observations About the Atlantic Institute," report to the Board of Directors, The Atlantic Philanthropies, February 2017, p. 2.
- ⁶ Quotations in this and the preceding paragraph are from Ben Cairns and Katie Turner, "Learning and Assessment Partner Report for the Atlantic Institute," Institute for Voluntary Action Research, Feb. 13, 2019, pp. 3-4.
- ⁷ Oechsli, "Ending Well," 2015.
- ⁸ Minister for Health, Republic of Ireland, "The Irish National Dementia Strategy," Department of Health, December 2014, p. 10.
- ⁹ Kinsta.com, "What is WordPress? Explained for Beginners," May 1, 2019, at <https://kinsta.com/knowledgebase/what-is-wordpress/>.
- ¹⁰ Elizabeth Cahill, "Atlantic Fellows Global Identity: 2019 Communications Work Plan," internal working document, The Atlantic Philanthropies, 2019, p. 1.
- ¹¹ The author was present for these remarks. The quote is taken from a notebook he kept at the Ford Foundation from 1978 to 1980, which included many comments from Mr. Sviridoff.

