

From Big Ideas to Big Change

A Communications
Guide for
Grantmakers

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From Big Ideas to Big Change

What's in This for You	2
Get Your House in Order	5
Internal Tune Up	5
Making Grantees Part of the Picture	12
Identify and Amplify the Central Concepts	14
Make the Strategy Shareable	14
Role of the Foundation.....	16
Role of the Grantee	17
Role of the Third-Party Validators	20
Measure Impact	22
Final Thoughts.....	24
Resources	inside back cover

What's in This for You

"If grantees don't get the bigger picture, we are less likely to actually be successful in what we want to achieve . . . [when they do get it] it makes reviewing proposals, making grantmaking decisions, and communicating the rationale of those decisions easier and clearer."

—Response to a recent Spitfire survey of foundations

When it comes to philanthropic communications, there is good news and there is bad news. The good news is that many foundations are committing more of their resources to communications than before. But while foundations have increased their commitment to communicating about their missions, strategies and work, they are increasingly receiving low marks from grantees who report that this investment isn't leading to greater clarity.

The Chronicle of Philanthropy reported that after receiving the results of a Grantee Perception Report prepared by the Center for Effective Philanthropy, Jeffrey S. Raikes, chief executive officer of the Bill & Melinda Gates Foundation, held conference calls with grantees and wrote a letter to grantees acknowledging that many of the groups the foundation supports believe it is unclear about its goals and how it makes decisions and that it is often unresponsive. Mr. Raikes outlined short-term steps the foundation would take to immediately improve its relationship with its grantees and said that the foundation is working on a long-term action plan to address more systemic issues that may require fundamental changes in how it works.

Gates is but one of many foundations struggling with the challenge of clearly articulating its goals and its strategy for attaining those goals to grantees and the public, and your foundation may well find itself in this group. Beyond communicating a change strategy, your foundation must also engage with grantees to describe where they fit in. To do this, everyone within the foundation needs to understand your change strategy and know how to talk about and engage people in this strategy.

Lack of clarity among grantees about your foundation's change strategy and the grantee's role in it leads to inefficiencies and missed opportunities. Program officers spend more time reviewing grant applications that do not meet their needs. The overall impact of your foundation may diminish as projects fail to make progress toward the change you want to see—or organizations that can help make the change happen do not apply for grants because they don't know they are a fit.

Grantee understanding of your foundation's change strategy is only one marker of communications success. Grantees can also be invaluable communicators of central concepts that are core to your change strategy. If foundations don't actively look for synergies among their work and their grantees' work, they miss important opportunities to further multiple agendas and create the very buzz they need to turn the changes they envision into reality.

"Grantees are typically a foundation's chosen agents of change, selected for their ability to create impact. The better a foundation can communicate its goals and strategy to grantees, the more effective these partnerships will be—and the more likely grantees will be to perform in ways that are consistent with a foundation's goals."

—CEP, *Foundation Communications: The Grantee Perspective*

Spitfire Strategies developed this guide to shed some light on ways you can plan your communications to support your foundation's change strategy.

A note about this guide:

1. We use "change strategy" to mean the change you want to see. Foundations may call this a theory of change, a framework, or something else. You may have one strategy. You may have ten. You may have different strategies for every program area or portfolio.
2. The suggestions for aligning communications can be done at the foundation level or program level. You choose which level is right for you.

To inform this effort, Spitfire conducted an anonymous online survey of 90 foundation staff to learn more about how funders are currently using communications to support their change strategies and make progress. We also conducted in-depth interviews with 28 foundation program and communications staff, asking them to tell us what works for them—and what they need to do better. We pored through theory of change literature from foundations, as well as those who study foundations. We are especially grateful to the Center for Effective Philanthropy (CEP) for opening its cache of information and resources.

(Note: All the grantee information from the Center was completely anonymous and any identifying information was removed before they passed it to us.) We then asked colleagues in the field to peer review this report and to confirm that we have hit the main challenges and are offering realistic recommendations. This guide offers some effective practices from foundations that have figured out how to use communications to improve impact, and provides insights from lessons Spitfire has learned during our years of working with nonprofits and foundations.

The comments from the peer reviewers confirmed two things: one, that this is a huge topic and the recommendations offered here are just the tip of a much bigger effort; and two, the recommendations we have included here can help any foundation, regardless of size or budget, or whether or not it has a dedicated communications staff. Good communications practices are integral to every foundation. It is important to note that the suggestions in this guide are not minor adjustments. Nearly all of them require foundation-wide changes. Most will mean additional work or a different way of working for foundation staff. However, they don't all have to be tackled at once. The attached tool can help pinpoint which recommendations are most critical and which can be phased in over time.

We have boiled this learning down to three important steps you can take to align strong communications to support your change strategies.

Step One: Get Your House in Order by clarifying how to describe your foundation's/program's change strategy consistently.

Step Two: Identify and Amplify Your Central Concepts. First identify which concepts are central to the strategy that your foundation and others need to communicate about effectively. Then determine which communications role the foundation is best suited to play, where synergies exist with your existing grantees' communications and where third-party validators can bolster your efforts.

Step Three: Track Communications Progress at Multiple Levels—foundation, grantee and beyond—to get feedback that allows for modifications that will lead to greater impact.

Read on for tips, insights and success stories from the field that can help you navigate these steps. Use the tool in the back of this report to capture your thinking.

Get Your House in Order

Effectively communicating your change strategy to grantees must start with establishing clarity within the foundation.

Internal Tune Up

It is difficult, if not impossible, to successfully explain your strategy for change to grantees if there is confusion among foundation staff, leadership or the board about the kind of change you want to make, how you plan to make it and what you want to say about it. Effectively communicating your change strategy to grantees must start with establishing clarity within the foundation.

Identifying the barriers to clear internal communications is the first step toward conquering them. Here are the top offenders.

We have this chart . . . dashboard . . . vision thingy . . .

Many of the foundation staff we interviewed told us that their foundations' strategies for change exist only as a chart, dashboard, diagram or similar format. Charts are easy to paste in a report, put in a presentation or load onto a website, but the meaning of visual indicators like arrows, bullet points, overlapping circles, and multicolored squares is difficult to convey in a meaningful way. Making sense of the chart can become an exercise in futility for anyone who didn't have a hand in putting it together. Visual representations of your change strategies can be a helpful teaching aid, but they should never be the only format used.

A narrative—both written and spoken, preferably the latter—is the best way to share information about your change strategies. It's your opportunity to tell your story in your own words, using compelling examples to make your case and making it personal for your target audiences. The narrative must have strong buy-in from program staff and trustees who will have to repeat it. If it is considered too complex, too simple or incomplete, some colleagues may merely use it as a jumping off point and their expanded explanation could lead to inconsistency and confusion.

A good narrative example can be found on the Geraldine R. Dodge website. On clarity of the foundation's communication of its goals and strategies, Dodge is rated higher than 90 percent of surveyed funders and higher than all other cohort funders.

Wilburforce Foundation gets high marks for being clear about what it funds, what it expects to achieve, and the role it plays.

Links for both of these examples can be found in the resources section of this guide.

Find ways to talk about your grantees and connect them to the foundation's overall mission. You may encounter resistance to this idea. Some will worry that articulation will lead to a flood of grant requests. Others will worry that highlighting some grantees to illustrate change strategies will look like they're showing favoritism or giving preferential treatment. Find ways to navigate these excuses.

Failing to explain where you want to go and how you want to get there puts your grantees, your program officers, and your communications team at a big disadvantage.

The best way to deal with excuses is to tie the reason for doing things differently back to the very values the foundation wants to embody and showcase. If your foundation strives for transparency, clarity helps with that. If your foundation says it amplifies the work of grantees, giving specific examples helps with that. Show how these practices are in line with the values of the foundation.

Still others will be concerned that a clearly-articulated change strategy will "box you in," limiting flexibility. Remind these critics that failing to explain where you want to go and how you want to get there puts your grantees, your program officers, and your communications team at a big disadvantage.

Ideally, every foundation should have an entire change strategy package that promotes consistent communications through various foundation outreach activities. Key elements of this package would include a well-crafted narrative, talking points, an elevator speech, and a story that epitomizes the narrative and depicts the desired change.

When the Atlantic Philanthropies realized that a series of strategic changes in their programs might have caused some confusion among its grantees, the foundation tackled the problem head-on. In addition to communicating the strategies and rationale through its newsletter and website, program staff took their message straight to their grantees. According to Atlantic communications executive Edith Asibey, "Program staff communicated directly to grantees about the changes, why they were made and how they would impact the grantees—and they did it in narrative form."

Smart and Effective Practices:

- **Say it, don't display it.** Charts should be used as props, not stand-alone explanations. All foundations need a narrative that effectively explains their change strategies. The narrative needs to be approved and widely embraced among foundation staff and leadership and available in both a written and verbal format.
- **It's the journey and the destination.** Your change strategy should be clear on what success looks like and how your grantmaking will get you there. In many cases, it will be helpful to start with the status quo as you see it in order to make it easier to see how your desired end state compares.
- **Keep it simple.** Visual representations of change strategies need to be straightforward. Even the most complex or elaborate strategies can be distilled to a few main points.
- **Give examples of how your strategies come to life.** Stories are more compelling than theories. Trust us on this.

Beware of the buzzwords

Often, commonly used terms mean different things to different people. Jargon like “sustainable” or “scale” or phrases like “political will” or “vibrant nonprofit sector” are used frequently, but the meaning of these terms can change depending on the context and user. In Spitfire’s survey of foundation staff, when asked if they think their colleagues have different definitions or meanings for the same words, two-thirds of respondents said yes. Without widespread agreement about what words mean, program staff may think they are all saying the same thing, but really they are just using the same words to say a lot of different things.

“Philanthro-speak” can also muddy the communications waters. Concepts and terms that are regularly used within your foundation may have a different or no meaning outside the office and seem like a foreign language to grantees. A response to a CEP survey asked for the foundation being evaluated to “make clear their funding priorities” and noted that phrases like “transformational projects” are unclear and have little value. This caution also applies to project-specific jargon. You may well have a definition of “market-based,” “at-risk,” or “public programs” in mind, but if it’s not the same definition your grantees have, you won’t get the results you want.

“This year’s RFP language is very confusing, and uses a lot of ‘industry’ speak. It sounds like a grad student or blogger, who has little experience with actual grantees, wrote it. The language seems very unprofessional, and makes me distrust their commitment to their goals and mission.”

—Grantee comment from 2009 CEP Grantee Perception Report

Smart and Effective Practices:

- **Be specific.** The meaning of any potentially ambiguous term needs to be spelled out so that foundation staff can effectively explain it to someone else. Avoid jargon and write out acronyms. Create a “banned words” list of jargon, buzzwords and insider terms and keep these words out of all communications about your change strategy. If you need help identifying jargon, check out: http://comnetwork.org/Jargon_Finder.
- **Test it out.** If you’re not sure if you’re using jargon or vague buzzwords, try explaining your strategies to someone outside the foundation. If they’re confused, find out where and revise your language until it is clear.

It’s posted on the website . . .

When we asked foundation staff how they tell their grantees about their change strategies, the reply was frequently, “It’s on our website.” This, in and of itself, is not a bad thing. Unless you’ve made a strategic decision to keep your change strategy out of the public eye, it should be on the foundation’s website and easily accessible to anyone who may want to review it.

But for grantees, solely referring to material on a website (or a brochure, newsletter, or annual report) can and often does lead to confusion and miscommunication about a foundation’s goals and strategy for change. Whenever possible, actively engage grantees in discussions about the changes you want to make. Two-way communications with grantees will ensure you are getting timely feedback and enable you to clear up confusion in real time.

In The Center for Effective Philanthropy’s 2009 Grantee Perception Report, respondents said they understood their funders’ priorities and expectations better when they were able to interact directly with program staff either on the phone, by e-mail or in person. Multiple responses underscore that being able to talk to a real person, as opposed to getting information from a website or printed collateral, is greatly valued by grantees.

“I find personal communication to be more efficient and clear.” “Discussions with our program manager are, by far, the single most helpful resource in understanding the Foundation strategies and direction.” “The Foundation staff is very accessible and we get the most insight when communicating directly with them.”

—Grantee Comments from 2009 CEP Grantee Perception Report

Too much reliance on websites or other passive forms of communication can also exacerbate internal confusion about the change strategies. If your foundation's staff feels like they don't need to talk about the change strategies, they miss opportunities for on-the-job practice that will make them more effective at communicating the desired changes. The less they practice, the harder it is for them to explain the strategies and the more likely they are to send grantees to the website: it is a vicious cycle, but one that can be broken.

In response to its Grantee Perception Report, the California HealthCare Foundation developed an internal checklist for program staff to use with grantees. (See resource list for link). The checklist serves as a helpful reminder to program staff of the key topics they need to cover when meeting with past, prospective and current grantees, and sets clear expectations between the parties involved.

Smart and Effective Practices:

- Program officers are the most effective communications channel for reaching grantees because they have the most opportunities to interact. Take advantage of every grantee interaction as an opportunity to reaffirm the foundation's change strategy as well as connect the grantee's work to that strategy. It may seem awkward at first, but a quick reminder will go far toward ensuring every interaction with grantees becomes an opportunity to explain, clarify and strengthen your strategies for creating change.
- Find what's working and use them as models. If one program officer is particularly good at communicating the change strategy to grantees, determine what makes him or her effective. Is he getting specific support from the foundation? Is it something about her specific program versus other programs in the foundation? Has he developed a tool or system for effective grantee communications that can be shared with others?
- Chart the various opportunities foundation staff has to actively communicate with grantees about the foundation's change strategy—starting with meetings, which are often the most numerous. Set up a system for tracking progress on when and how the change strategy gets communicated through these opportunities.

We distributed an all-staff e-mail with talking points attached . . .

Your foundation's change strategy supports its mission and drives everything it does. Everyone within the foundation needs to know it and understand it. This is especially critical for all staff that have regular contact with grantees—from communications staff to program staff to the staff who answer the phones. Trustees who are often in the hot seat when strategies change need to be clear on their communications responsibilities.

Active learning is the most proven teaching method for adults, and is a vital tool for fostering internal comprehension of your foundation’s change strategy. However, Spitfire’s recent survey of foundation staff found that of those who receive training on their foundation’s change strategy, 93% are trained with talking points or a chart while only 6.5% are trained using role-playing.

Too often, preparing foundation staff or board members to communicate about the change strategies amounts to a click of the send button and the assumption that once the talking points are out there, staff will read them, understand them, and deliver them effectively to key audiences. Unfortunately, e-mail does not actually do the talking.

“Repetition and consistency are key. Our staff got familiar with the change theory, and I think familiarity breeds ease.”

—Adam Coyne, former Director of Public Affairs and Social Media, The Robert Wood Johnson Foundation, now at Mathematica

To fully understand the talking points and be prepared to deliver them in a compelling and effective manner, messengers need an opportunity to ask questions, clarify the meaning of specific words and phrases, and practice delivering your foundation’s main points in their own voice. They also need to understand the decisions that led to the creation of each point and the various situations in which they are expected to act as messengers and deliver these points. Without making absolutely sure that staff understand what your foundation wants to achieve, there is no way to be sure they are getting it right when they communicate with grantees and other external audiences.

According to CEP, grantees frequently report feeling like they waste time and effort trying to get clear information—especially if they are suddenly redirected midway through a project.

“The biggest problem seems to be in consistency of communicating what [foundations] want grantees to do. They seem to want to be helpful but [our program officer] could never seem to communicate what [the foundation] wanted of us and supposedly others, and there have been many, many misunderstandings and angry feelings as a result.”

—Grantee comment from the 2009 CEP Grantee Perception Report

One of the best ways to make sure staff take this seriously is to incorporate it into their annual performance review. In *Foundation Communications: The State of the Practice*, a survey conducted for the Communications Network, author Howard Beindel noted, “In [foundation] communications, the most universally tracked item is Web hits, followed by press coverage.” Grantee perception report scores came after these. More telling is when communications officers were asked about the criteria used in their evaluations, press coverage topped the list, while clear, consistent communications to grantees wasn’t even on the list. If it isn’t on the list for the communicators, it may not be on the list for program staff either.

Finally, to guarantee grantees are receiving consistent messages, it is important to ensure your messaging is the same across all communications channels—from talking points to online resources and printed collateral materials.

Smart and Effective Practices:

- **Take (or assign) responsibility.** Whether it is leadership, communications staff or program staff, someone at the foundation must be responsible for ensuring all staff understands the organization’s change strategy—and that staff that are responsible for talking about the change strategy are able to deliver talking points in a consistent, compelling manner.
- **Don’t forget the board.** They are a critical end audience that needs to understand and buy into the change strategies the foundation is pursuing. Some may have been instrumental in developing the final strategies. All need to understand them. If they are lost in the ether of complex theories or are left in a position where they can misinterpret the strategies, the resulting confusion undermines staff confidence and ultimately leads to weak grantmaking.
- **Train staff and board.** Whether one-on-one or as a group, take time to work with staff and ensure they are getting the messages right. Make training staff on your foundation’s change strategy a part of the on-boarding process for new hires. Regularly ask staff to practice messages and role-play talking about the change strategy with each other. Build opportunities to do this into staff meetings, retreats and other staff functions. Make staff accountable by including communications success as a performance benchmark in reviews.
- **Conduct a message consistency check.** Have someone listen to what program staff are saying about the change strategy, then compare their talking points with the messages that are on the website, in the board books, disseminated through press materials and included in printed collaterals. Identify inconsistencies and eliminate them.

According to a case study written by CEP about The Wallace Foundation, the leadership of the foundation decided to focus on raising its below-average scores for clarity of communications. One of the most important things they did was conduct a full-blown audit of their communications to grantees. They found that the foundation was largely silent on their larger goals. Lucas Held, the foundation’s communications director, noted in the case study, “No wonder [the

grantees] didn't understand where they fit into the larger foundation strategies. We didn't mention it."

If you change your change strategy, go back to the beginning and start again . . .

Periodically you may change your strategy. When this happens, all of the communications work has to start all over again. Realize that when you change course, grantees get anxious. Clear and frequent communications is one of the best ways you can make a smooth transition. Don't take shortcuts. Follow all the steps outlined above once the hard work of developing a refreshed strategy is complete.

Making Grantees Part of the Picture

When asked what foundations could do that would be useful to grantees, a CEP survey respondent said, "More communication regarding the foundations' interest in our work and how it may connect to [the foundation's] interests."

Once your foundation has a clear internal understanding of its change strategy, it is time to go a step further and make sure every grantee understands its role within these strategies.

This is a two-way conversation. As a funder, you say: "These are the change strategies we've developed to help achieve our mission. We see your work fitting here." Grantees then need to give feedback, ask questions and make suggestions. Both parties gain new insights and are able to learn from each other. Ultimately (hopefully), both you and the grantee come to a shared understanding about where there is alignment. Grantees understand and value what you are trying to do. You understand and value what the grantee is trying to do.

In an effort to forge stronger grantee-grantor relationships and increase understanding of foundation goals and programs, the McKnight Foundation began holding convenings of its regional development grantees in 2010. These program-specific meetings provide an excellent opportunity for grantees to discuss their work and hear from others who are working on similar program

"We do get-acquainted meetings with grantees where we explain why the foundation is doing what it is doing, what its aims are and what the expectations are for the work we fund. We make a real front-end effort to be as clear as possible, and then try to carry that through during the rest of the year. Front-ending communications limits confusion down the line."

—Lucas Held, Communications Director, The Wallace Foundation

issues. Oftentimes grantees find that their goals align, form partnerships with each other, and find synergy in their work. These convenings also provide McKnight with the perfect opportunity to clearly articulate their strategy and goals to their grantees.

So what happens when grantees report to multiple funders and each funder has different change strategies? Foundations—unless they are part of a special collaborative—traditionally have disparate change strategies. To avoid pulling grantees in opposite directions or forcing them to expend resources trying to be different things to different funders, foundation staff should know the other funders in their field and be familiar with their individual change strategies, know where there are differences and understand how those differences could impact shared grantees. Whenever you can, offer clear direction to your grantees so they are not left navigating this difficult terrain without guidance.

Smart and Effective Practices:

- **Start setting expectations early about where opportunities for alignment are.** When you invite a grantee to submit an application or respond positively to a letter of inquiry, clearly state your change strategy and tell them why you think their work can support them.
- **Have them say it back to you.** Ask grant applicants to describe how they anticipate helping you achieve your change strategy in a way that fits with their work. Make an “alignment with the change strategy” section mandatory for every grant proposal.
- **Incorporate the goals and progress measures into grant agreements as an additional step.** Everything is “on paper” and can be referred back to by both grantee and grantor as the written record of what was agreed to by both. The agreement and scope then become the touchstone for resolving any disagreements.
- **Get progress reports.** Making alignment with your change strategy one of the reporting requirements is an effective way to set clear expectations about what progress looks like to you, and gives your grantees a chance to show how their work is contributing to progress. At the Evelyn and Walter Haas, Jr. Fund, the objectives of their change strategy and the expectations are written explicitly into the grant agreements and are part of the reporting requirements.



Tool Time

Turn to the planning tool at the back of the report and complete Step One to:

1. Create a narrative that explains your foundation’s or program’s change strategy.
2. Determine where you think your grantees fit in.
3. Determine how you will communicate the change strategy to grantees and get their input about their place in it.

Identify and Amplify the Central Concepts

You have clarity on how to articulate your foundation's change strategy and have committed to consistently communicating about that strategy to your grantees.

Now you need to identify the central concepts that need to be communicated for your change strategy to be successful. And you need to decide who will be doing the communicating—at the foundation level, the grantee level, and beyond. Start with identifying the central concepts as a way to make the change strategy shareable.

Make the Strategy Shareable

To build the climate needed to make your change strategies possible, start by identifying the central concepts that need to be communicated.

All change strategies come with built-in communications assumptions. To be successful in your work, people need to know and care about your issue. Certain people need to think it is a priority. Problems need to be seen as a real cause for concern. Solutions to those problems need to be credible and adopted. Behaviors or attitudes need to shift for your change strategies to be successful. To build the climate needed to make your change strategies possible, start by identifying the central concepts that need to be communicated. Concepts can include: big ideas, policies, evidence (which is crucial to discussions) and examples or stories of the problems and, as available, solutions.

Here are some examples of central concepts that are integral to specific philanthropic change strategies.

A group of funders came together and one of their change strategies was to eliminate smoking in public spaces. To succeed, they needed to build widespread agreement that:

- Second hand smoke was dangerous and had serious health consequences.
- Smoke-free bars and restaurants would not damage those businesses' bottom lines.
- Policymakers who support this would not experience political fallout.

When funders want to protect biodiversity by getting more land designated as wilderness, they need to effectively communicate that:

- The land will not be cut off from all uses.
- There will be important bio-diversity gains.
- Recreation-based businesses bring more sustainable economic benefits than extraction businesses.

When funders want to have a transparent nonprofit and philanthropic sector, they need to effectively communicate that:

- Transparency builds trust with donors and the public.
- Transparency won't open up an organization to an unmanageable risk.

Local funders aiming to increase participation in a region's arts and culture activities need to communicate that:

- Without leaving their community, residents can take part in hundreds of arts and culture activities every year.
- The region is home to innovative arts and culture opportunities that can't be experienced anywhere else.
- There are opportunities available at every price—including many for free.

These are just examples. Your change strategy may have one, a couple or many central concepts.

Smart and Effective Practices:

- Don't have more central concepts than you have the bandwidth to communicate through the foundation, grantees or others.
- As you develop central concepts, you need to have a good understanding of the context in which you will be communicating about your work. Is it a friendly climate or a hostile climate? Do the people you want to talk with know a lot about your issues or a little? Is it easy to talk about or hard to talk about? Are there a lot of misconceptions?
- Whenever possible, it is helpful to have available the evidence behind the central concepts. This means that those who are communicating will have more reason to endorse them, and, when challenged, are better able to answer questions.

Tool Time

Turn to the planning tool and complete Step Two, Part A to identify the central concepts of your change strategy that need to be communicated to create a positive climate for the change you want to see.

Role of the Foundation

Start with the foundation itself. What role will it have in communicating the central concepts of your change strategies to a wider audience beyond grantees? There are many options.

Some foundations deflect the spotlight and prefer that attention be directed to the work of their grantees. These foundations may offer grantees communications support and guidance, but they do not actively communicate to external audiences. Other foundations lend their voices directly to supporting the change. If your foundation is in the latter group, it is critical to make deliberate, strategic decisions about what the foundation will do, develop a plan to guide this work and successfully implement it.

Wilburforce Foundation does an excellent job communicating its strategic plan on its website. It lists its approach in a clear, concise manner that details the many roles it expects to play within the conservation community as a grant-maker, investor, information disseminator, convener, collaborator and evaluator.

Consider the following possible roles, keeping in mind a foundation can pursue as many of these as appropriate. Also feel free to create additional options.

- **Convener:** You convene people to discuss topics important to your change strategy in order to better understand the issues, learn from peers or reach agreement on an issue's importance.
- **Thought leader:** You often serve as a spokesperson at important gatherings, in the media and in social media networks or on certain topics.
- **Policy voice:** You frequently educate policymakers about certain issues and possible solutions (staying within lobbying restrictions, of course).
- **Information disseminator:** You may issue important landmark reports that make the case for something or expose a problem directly from the foundation rather than through grantees.
- **Grantee promoter:** You conduct outreach to highlight the work of grantees making important breakthroughs.
- **Funder collaborative leader:** You choose to share best practices and encourage investments for certain strategies.
- **Capacity builder:** You give support behind the scenes to ensure grantees have the capacity to communicate effectively about their work. This may be by conducting messaging research to give grantees data points to support tough conversations or by hosting trainings designed to build grantees' communications skills.

One of the goals of the KDK-Harman Foundation, a small family foundation in Central Texas, is to build the capacity of community organizations that work in partnership with schools. The foundation has made it a practice to distribute quarterly grant updates and press releases to select local, state and federal policymakers. By highlighting the work of its grantees, KDK-Harman is able to

reach out to important audiences and communicate which solutions its grantees are implementing that will lead to better educational opportunities.

You must determine the role the foundation will play before you can develop a communications plan to guide your work. Identify your priority audiences to help determine which role is more likely to engage them. Consider the opportunities you have to communicate with them and which foundation messengers will be best to do the communicating, either because they are the most credible or most influential with audience targets. Finally, consider the foundation's overall capacity: what are you actually able to accomplish given your financial and human resources?

Don't forget to decide what role your trustees could or should play. When a foundation decides to pursue a more public profile, it is important to involve your trustees since they could be greatly impacted by this decision.



Tool Time

Turn to the planning tool and complete Step Two, Part B to define and plan for the role your foundation will play in communicating your change strategy. Consider audiences, opportunities and messengers.

Role of the Grantee

For your foundation to be successful in its work, grantees need to communicate successfully about the central concepts identified in the previous section. Foundations can't do it alone. Grantees are an obvious choice to do this.

In Spitfire's recent foundation survey, an overwhelming 76.5% of respondents agree that for a funder's change strategy to succeed, grantees need to play a critical role in communicating about the central concepts of that change. However, almost half of those (43%) admit they do not know which grantees should be communicating about which central concepts.

A first step for foundations who want to work successfully with grantees is to figure out where there are natural connections and agreement. This is not about grantees communicating a foundation's specific change strategy. It is about figuring out which of the central concepts critical to the foundation are also important to the grantee.

You can map this. Line up the central concepts important to your foundation's change strategies and see which grantees may be communicating about them already or could be in a position to do so. This can be done in a variety of ways. You can use your knowledge of your grantees from applications, grant reports and grant evaluations. You can ask them directly during check-in calls. You can conduct quick audits of their communications by looking at their website, newsletters, press coverage, tweets and Facebook posts, brochures, etc.

Once the mapping is done and the grantees with strong communications potential are identified, funders can go a step further and engage with grantees to find out what is possible for them moving forward. This assessment is necessary for you to figure out if grantees are ready, willing and able to work with you to communicate about the central concepts you want to convey. Is there a natural fit? Do the grantees have the capacity to do this well?

An overwhelming 76.5% of respondents agree that for a funder's change strategy to succeed, grantees need to play a critical role in communicating about the central concepts of that change.

The Robert Wood Johnson Foundation's (RWJF) Quality/Equality team realized that they and their grantees struggled with ways to talk about quality health care in a powerful way. For them to succeed in their work, they needed to overcome this challenge together. RWJF convened with grantees and struck a deal. The foundation would develop messages that everyone could use. The grantees agreed to find ways to reinforce the messaging in talking point, on the web and in press materials. The foundation now provides communications resources at the start of each grant, including a handbook with core messages and elevator speeches. Communications consultants are assigned to each grantee to develop tailored messaging and materials. The foundation explicitly sets grantee communications expectations in the grant agreements. Evaluation reports include an audit of collateral material that check for consistency and clarity of messaging. It should be noted that RWJF provides a very robust package of resources to grantees to align grantee and foundation messaging and build grantee communications capacity. RWJF knows its overarching message regarding quality health care for all is amplified when it stands shoulder-to-shoulder with its grantees.

Ask yourself the following questions to see if you can incorporate your grantee(s) in your communications outreach plan.

- Is the grantee ready and willing to be an active participant in communicating central elements of your foundation's change strategies?
 - Does it see this as important to its own work?
 - Is there synergy? Do you both understand why it will help all efforts?
 - Has it made this a priority and incorporated it into their communications strategies?
- Is the grantee able?
 - Does it have the right skills to conduct successful communications activities?
 - Does it have enough resources (staff, time and money) to carry out the work successfully?
 - Does it currently reach the audiences that the foundation has identified as important to reach?
 - For additional questions that will help assess the communications capacity of a grantee, check out: <http://www.spitfirestrategies.com/Tools/foursquare.html>.

Being clear about the role each grantee can play in communicating the central concepts of your foundation's change strategy will help you identify gaps.

Consider incorporating this due diligence directly into the foundation's grantmaking process to assess where opportunities exist to amplify central concepts. Being clear about the role each grantee can play in communicating the central concepts of your foundation's change strategy will help you identify gaps. Doing this assessment will also allow you to see if there are ways the foundation can improve grantees' abilities to communicate effectively. This may include doing group capacity building training or providing one-on-one communications assistance.

Years ago, the Robert Wood Johnson Foundation decided to invest in communications capacity building trainings for their grantees. RWJF maximizes the impact of the foundation by using its extended network of grantees' voices to communicate the values that are congruent to its own. Through a year-long strategic communications training, the foundation provides communications training that focuses on grantee capacity building. RWJF trains grantees on messaging, policymaker outreach and communications planning. Regular check-in meetings with grantees ensure that foundation staff is able to review grantee messaging for alignment with RWJF's values and goals. The decision to fund these programs and communicate regularly with their grantees has led to a more unified, consistent message that has more impact on key decision makers.

This mapping and assessment works best as a collaborative process.

An innovative way to build synergy around central concepts in your change strategies is to engage grantees in the identification and development of the concepts themselves. The David and Lucile Packard Foundation's Marine Fisheries Subprogram supports more than a dozen grantees that are all working to improve the health of the oceans by transforming the seafood market. This transformation is central to Packard's change strategy about how to work toward sustainable fisheries. These grantees work together in a collaborative called the Conservation Alliance for Seafood Solutions. To create a strategic framework to guide the collective efforts of this portfolio of grantees, Packard provided a consultant to the grantees to develop a shared change strategy. The grantees worked with the consultant to identify all the strategies and approaches the grantees were using and understand how they fit together to create change. The resulting change strategy not only provided a road map for the work of the grantees, but it also supported Packard's vision. Because they were engaged in its development, grantees understand where they fit in and naturally communicate central concepts to advance their work.

Once the mapping and assessment is done, foundations should decide if certain communications expectations are requirements of the grant.

The Annie E. Casey Foundation is very explicit about its communications expectations of its KIDS COUNT grantees. Casey used the KIDS COUNT Network to help the foundation achieve its role as an influencer of state and federal policy. An



Tool Time

article from *The Foundation Review*, 2010 Vol. 1:4 noted, “The foundation has increasingly come to see grantees as a network through which priority policy messages can be promoted...The Casey Foundation selected KIDS COUNT grantees for their common expertise in assembling and communicating data for their states...Casey views these grantee characteristics as assets to the foundation and important to its role with regard to policy influence.”

Other foundations are less explicit. They do not give grantees specific communications requirements, but they do want to be able to track communication efforts around their central concepts. Some find ways to share how the work is going among grantees, including communications efforts, while allowing for feedback and suggestions. This may mean sharing with grantees how an issue is playing in the media, convening grantees to talk about successes and challenges when communicating about the work, or noting where grantees are having breakthrough conversations that others can learn from.

For example, every month the Mary Black Foundation holds a grantee roundtable. Grantees get a safe space to have an open discussion with both foundation staff and their peers about the work they are doing, including communications efforts, to share success stories and to discuss challenges and possible solutions. Grantees can learn best practices from others in the room, and funders get a better sense of the opportunities and challenges their grantees are facing and can respond with more support if needed.

Turn to the planning tool and complete Step Two, Part C to map where there might be synergy for grantees to communicate central concepts important to their work and to the foundation.

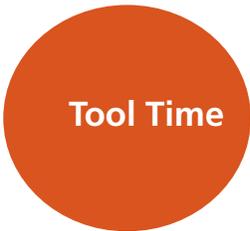
Role of the Third-Party Validators

Beyond grantees, you may also choose to work with individuals and outside groups to communicate your central concepts. This may include coordinating with peer funders, other thought leaders or unlikely allies.

This may be a good strategic choice if, after mapping which grantees are communicating about what, you find a gap. Or you may choose to pursue this strategy if you know you need to deal with a weakness discovered in your context analysis. For example, if one of the big barriers to having arts in schools is that teachers don’t see arts as valuable in the era of “teaching to the test,” you may choose to work with academic experts who will say how arts improve scholastic performance. Finally, outside validators may be a good choice if you need to bring an unlikely ally’s voice into the debate. This could be a voice that isn’t usually front and center in the debate—like evangelists on climate change—or it could be a voice that is usually on the opposite side of a particular issue, like

a right-to-lifer coming out in favor of stem cell research. This may be the only area the two of you can agree on, but if their voice really helps fuel a conversation you need to have, it would be smart to find a way to engage together.

The important thing to keep in mind is that since these are partners, foundations need to be comfortable with having less control over the execution of communications strategies.



Tool Time

Turn to the planning tool and complete Step Two, Part D to note possible third-party validators that can fill in gaps or augment communications about a central concept.

Measure Impact

Assessing the impact of its efforts to communicate about its change strategy—from determining whether grantees understand the concept and their role in it, to confirming the right concepts are reaching the right audiences—is vital to any foundation’s ability to create change and achieve its mission.

We discovered that some foundations, even the ones that are modeling best practices in other areas, are falling short when it comes to measuring their work around communicating about their change strategies with grantees. Some are simply assuming that their efforts to communicate with their grantees are working, and that grantees are communicating central concepts of the change strategy successfully.

Thoroughly assessing your foundation’s efforts to communicate its change strategy—in real time to inform mid-course corrections—requires multiple metrics.

Other foundations are doing some testing, often in the form of Grantee Perception Reports. However, these assessments are retrospective by design and are not conducted frequently enough to provide mid-course correction to current efforts. If years pass between reports, it can be difficult to ascertain the link between cause and effect. An improvement in marks may be related to a specific change the foundation made, like updating its website, or it may be related to something else entirely.

Thoroughly assessing your foundation’s efforts to communicate its change strategy—in real time to inform mid-course corrections—requires multiple metrics.

The funders that are most successful at measuring their efforts are the ones that collect data in several different ways, including gathering anecdotal evidence, commissioning grantee perception reports at yearly intervals, and building explicit requirements related to communications into grant reports.

For example, the Robert Wood Johnson Foundation requires its active grantees to conduct media audits and send the clips to its communications and program officers. By making the audits a reporting requirement, RWJF is able to review the messages grantees are putting out there and confirm they are successfully amplifying the foundation’s central concepts.

Wilburforce Foundation organizes each of its dockets around specific regional strategies that fall under its overarching strategic framework. Each docket cycle, Wilburforce schedules calls with grantees on or near the anniversary of their funding. Program officers block out one to three weeks for these focused, hour-long calls which are set up to learn from and assess the work each grantee is doing, develop or refine the focus for any forthcoming grant proposals, and confirm that the work is consistent with the foundation's change strategy. Program staff complete tailored reports on each grantee, make notes about concerns and include follow-up steps or other activities the foundation needs to take to support grantee activities that relate directly to the foundation's change strategy.

Smart and Effective Practices:

- **Invest in multiple measurement tools.** Getting the most accurate picture of where your grantees stand requires more than one feedback mechanism. Good options include:
 - Commissioning grantee perception reports.
 - Collecting anecdotal evidence.
 - Including explicit reporting requirements in grant reports and check-in calls.
 - Conducting citation searches.
 - Undertaking periodic surveys on issues that are important to the foundation.
- **Look ahead.** Rely on assessment tools that evaluate communications efforts in real time and offer insights and opportunities to make mid-course corrections. For example: iGoogle allows you to create a customized homepage to get the latest news and updates through newsfeeds, twitter, Facebook, Google News, etc. By adding gadgets on your iGoogle page, you can create a dashboard to access activities and information across the Web, all in a single page. Dashboards allow organizations to track and "listen" for what is being said about them, their grantees and issues important to them.
- **Measure progress of communications at multiple levels by asking the following questions and creating feedback loops to get answers.** You should decide which of these questions will provide the answers that are most important to your work. Mix and match as appropriate:
 - Is the foundation staff communicating effectively about the change strategy?
 - Is there consistency across the foundation's communications platforms?
 - Are the grantees clear on the foundation's change strategy and their role in it?
 - Is the foundation clear on which central concepts need to be communicated about to increase impact?
 - Which central concepts are getting good traction because of foundation communications? Why?
 - Which central concepts are not getting traction and what are options to improve this?
- **Celebrate Successes.** To uplift staff and grantees who do a good job communicating in alignment with the change strategy, note where this is happening and find ways to publicly celebrate this.



Tool Time

Use Step Three of the planning tool to determine what metrics you can use to track communications efforts meant to support your foundation's change strategy.

Final Thoughts

Ultimately, communicating about your strategy for change should not be a one-way street. It should be a conversation with grantees that takes into account their questions, abilities and ideas. Change strategies are rarely fixed, so developing a system that allows foundations to not only assess, but also learn from grantees, can lead to stronger (or new) pathways to success. We hope you'll be able to use the information we've collected in this guide to help you more clearly communicate about your strategy for creating social change with your grantees, strengthen your partnerships with them, improve your grantee perception report scores and increase the amount of communications happening that supports your change strategy. Most important, we hope that by making all of this come together, you will also increase the impact of your work to create the change you want to make in the world.

Resource List

California HealthCare Foundation—Improving Communication Between Foundation Staff and Grantees

http://www.chcf.org/about/assessing-our-impact/~/_media/Files/CHCF/CHCF%20ImprovingGranteeCommunications.pdf

Center for Effective Philanthropy—Foundation Communications: The Grantee Perspective

http://www.effectivephilanthropy.org/assets/pdfs/CEP_FoundationCommunications.pdf

Center for Effective Philanthropy—Lessons from the Field: Aiming for Excellence at the Wallace Foundation

<http://www.wallacefoundation.org/KnowledgeCenter/KnowledgeTopics/AreasOfContinuingInterest/PhilanthropicIssues/Documents/lessons-from-the-field-aiming-for-excellence-at-wallace-update.pdf>

Center on Philanthropy and Public Policy—How Foundations Use Communications Strategies in Successful Public Policy Engagement

http://cppp.usc.edu/news/first_research_of_its_kind_shows_how_foundations_use_communications_strategies_in_successful_public.html

Communications Network—Foundation Communications: The State of the Practice

http://www.comnetwork.org/news1/State_of_Practice.pdf

Communications Network—Are We There Yet? A Communications Evaluation Guide

<http://www.comnetwork.org/resources/research.html>

Geraldine R. Dodge Foundation

<http://www.grdodge.org/howtoapply/index.htm>

Grant Craft—Mapping Change: Using a Theory of Change to Guide Planning and Evaluation

<http://www.grantcraft.org/index.cfm?fuseaction=Page.ViewPage&pageId=1542>

McKnight Foundation—Response to 2010 Grantee Perception Survey

http://www.mcknight.org/files/GPR_10_ActionPlan.pdf

Organization Research Services—Lessons from the Annie E. Casey Foundation and Its KIDS COUNT Initiative

http://www.organizationalresearch.com/publications/foundation_review_article.pdf

PhilanTopic—15 Ways to Improve Grantee Communication at Your Foundation

<http://pndblog.typepad.com/pndblog/2010/08/15-ways-to-improve-grantee-communication-at-your-foundation.html>

Wilburforce Foundation

www.wilburforce.org/grant_guidelines/strategic_framework.html



www.bigideasbigchange.org

www.spitfirestrategies.com