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PRACTICAL WISDOM FOR GRANTMAKERS

COMMUNICATING FOR IMPACT STRATEGIES FOR GRANTMAKERS

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communicating for impact

strategies for grantmakers

contents

SPECIAL FEATURES

IN THIS GUIDE, grantmakers explain how they've used communications to advance programmatic goals. They discuss what's involved in developing a strategy, structuring a program, managing relationships, using new media, and evaluating communications activities. If you think communications is a luxury reserved for big foundations or the exclusive province of communications staff or consultants, think again. A "communications lens" can help any grantmaker achieve more impact.

This guide was written by Paul VanDeCarr and Anne Mackinnon.

Underwriting for this guide was provided by the Ford Foundation.

Publications and videos in this series are not meant to give instructions or prescribe solutions; rather, they are intended to spark ideas, stimulate discussion, and suggest possibilities. Comments about this guide or other GrantCraft materials may be sent to Jan Jaffe, project leader, at j.jaffe@grantcraft.org.

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Why Foundations Communicate

A family foundation that wants to build the capacity of a local nonprofit offers intensive communications training to its senior staff, thus helping the group raise its profile. An international foundation supports a global meeting on HIV and webcasts the event, thus increasing the audience many times over. A reproductive health funder brings together grantees and other leading organizations to formulate messages that help make the case and grow consensus in the field. In each case, the connection between program and communications is seamless — and the impact of the foundation's dollars is larger.

"There's no foundation or organization that doesn't need communications," explained a foundation communications officer, who proceeded to tick off a list of programs as examples: research needs to be disseminated; art needs audiences; health care information needs to be understood; funds need to be raised; members need to be engaged and donors cultivated. Foundations and the nonprofits they support can all use communications to increase their impact. The question is not whether communications helps, but how it can help most successfully.

Communications is more than just publicity: it's all the ways a foundation advances its own programs and the work of its grantees by connecting with clients, community leaders, the press, donors, peer organizations, funders, and other constituencies. But it's not always seen that way. "I came to the foundation from a community organizing background," recalled one grantmaker. "And I remember being startled by the [foundation's] tendency to think about communications as one-way. It seemed to be about getting people to do what we wanted them to do."

Foundations, this grantmaker continued, have opportunities to treat communications as multi-directional and integrated into program strategy from the start. The process begins by asking not *How do we reach our audiences?* or even *Who are our audiences?* but *What do we want to achieve?* From there, other questions naturally flow: *Who needs to be involved to achieve that goal? What do they think is the best way to get to our goals? How do we get them onboard? How do we reach them?* and so on.

In other words, communications *is not* just strategic or part of strategy: communications *is* strategy, and the questions begin as far upstream as they do with any carefully considered grantmaking. "I try to avoid using the word 'strategic,' as in 'strategic communications,'" said a communications advisor. "All communications should be strategic."

The Voice of the Foundation

A foundation may have good reasons to shy away from using its voice, at least some of the time: to keep the spotlight on a grantee and avoid creating distracting controversy, for example, or to honor the preference of a donor or board of directors. Some funders communicate regularly, but only in limited ways — through annual reports, grant guidelines, occasional press releases, and other routine vehicles. Other foundations communicate more freely and often, cultivating a public role, developing new messages in response to changing situations, and experimenting with new media.

A foundation's communications activities are means rather than ends, and any of these approaches can advance a foundation's mission and benefit its grantees. A key to success, grantmakers said, is to be intentional in using three distinctive assets that a foundation brings to the public arena: *reputation*, *relationships*, and institutional *resources*.

- **Reputation**. When a foundation cultivates its reputation deliberately, it does so because it wants to deploy that reputation in a particular way. Preferences for using the foundation's reputation — when, how, and why — are built into the culture of an institution; they're intimately connected with mission, priorities, and style. Some foundations want to be seen as highly objective, for example, while others make no bones about taking strong positions on problems and how they should be solved. Some want to act behind the scenes only; others are willing to be publicly acknowledged actors, even leaders, in their fields or communities. Some want to be known for careful research; others want to be known as bold supporters of new talent or high-risk projects. The list goes on. "Every foundation has habits and traditions regarding the use of its reputation," a communications director noted. A communications activity that might seem like an obvious and easy use of the institution's voice — writing an op-ed, signing a petition — actually requires "frank conversations about why this issue and not that one, what kind of precedent we'd be setting," and other strategic questions.

- **Relationships**. It's often true that foundations have more freedom and pull than other players — government, for example, or a grantee organization — to convene key people and get them talking. But the obligations are significant: when people heed a call from a funder and come to the table, they expect the purpose to be clear. The first step, then, in deciding to use a foundation's convening power is to nail down the purpose: to analyze a problem, seek consensus, develop a joint message, make a plan, launch a cooperative venture, learn from each other, or even just brainstorm. From there, it's important that the agenda be well crafted, the invitation list carefully considered, and the scope of the foundation's willingness to take follow-up action fairly well delineated. Foundations also have wider networks than most organizations, with contacts across sectors. For grantmakers, that can mean the possibility of brokering quiet communications — conversations among parties who have important things to discuss but can't afford to sit down together publicly.

- **Resources**. Many foundations have a permanent communications infrastructure — a website, regular written and spoken communications with grantees and other constituencies, stated funding priorities — that broadcasts a set of messages to the field and the wider world. When the need or opportunity arises, foundations may also have financial resources that can be used with some degree of flexibility toward special communications objectives. Beyond money, there's expertise among foundation program or communications staff and the ability to augment in-house capacity with a well-chosen consultant or contractor. A grantmaker can help grantees tap those resources by offering personally to be a sounding board on communications or connecting them with colleagues. "If you've got a communications office, call upon them," one grantmaker said. "They'll have ideas, thoughts, and contacts. And think about what you can do to advance small projects. You might be able to fund a grantee to do something like publish a booklet — and help them cross the finish line on an important piece of work."

Communications *by* foundations *about* foundations is not the subject of this guide. But savvy grantmakers know that, when used well, the foundation's voice can be a powerful asset for bringing credibility, purpose, and a certain gravitas to a communications opportunity or agenda.

Using a "Communications Lens"

If communications is strategy, why is it so often squeezed in at the very end? A consultant who frequently advises foundations and nonprofits on communications described a typical scenario: "We'll get a call from an organization saying, 'We have a report with some really interesting findings on education in California, and we want to release it in three weeks. Will you help us?' So they've waited until three weeks before the report is released to get help with outreach, rather than thinking about it much further upstream" — what the report is about, who they want to reach, how to get those people involved from the start, and how to frame the report in language that target audiences can understand and use. Treating communications as an add-on to the "real" work, like tacking on evaluation at the end of a project, means missing out on the full value of the activities and investments.

For grantmakers and grantees, using a communications lens begins early in the process and entails checking assumptions about who needs to be informed and involved if a project is going to achieve its ultimate goal. Once those assumptions are on the table, it's not unusual to find a gap that needs to be bridged, a misunderstanding that can be clarified, a possibility that hadn't been considered.

An international funder who supports work in Tanzania, for example, described a grantee who planned to use cell phone companies and FM radio stations to get out information on basic public services. But not everyone has access to cell phones or radio signals. The grantmaker urged the grantee to think about products that reach even the most far-flung villages. Everyone needs to buy soap, they reasoned. And so, with support from the foundation, the grantee has begun to explore the possibility of partnering with soap distributors to place messages on the packaging. "We don't know for sure that it's going to work," the grantmaker reported, "but it shows the need to think outside the box." And to think upfront about how communications is best built into program design.

In another case, a collaborative that included both environmental advocates and grantmakers was approached by a new prospective funder — one who surprised them by looking at their work from a new communications perspective. "This funder said, 'I love what

WHERE THE EXAMPLES COME FROM

To gather stories for this guide, we went to forward-thinking program staff at foundations large and small to find out how they're using communications to strengthen program impact. We also asked communications staff, consultants, and grantees for their perspective on the growing use of communications strategies within programs, rather than as an adjunct to foundations' core work. For a complete list of contributors, see page 25.

It's also worth mentioning that for this guide we've bent our usual GrantCraft rules and identified many contributors by name. Much of the work that's featured has resulted in web-based materials, videos, and other products that are publicly available and we wanted readers to be able to see them.

you're doing and your approach is great,'" the network director recalled, "'but I don't think you're going to get where you need to go with just environmental advocates. You need to bring other constituencies along with you.' We hadn't considered that before." The grantmaker provided funding that enabled the network to recruit more young people and faith communities to the cause.

A communications lens can also remind everyone to ask who *else* owns the agenda the grantee is pursuing. A funder of think tanks observed, "When funders talk about communications for think tanks, they usually mean that every grant should have a dissemination strategy, or that you should earmark 10 percent of your funding to do communications around the research: the policy briefs and press release and public meetings." All of that is important, she said, but the bigger challenge is to keep in mind that there are people out there who actually want answers to the questions the researchers are investigating. "We ask them up front, 'Why are you asking this question? Who is the audience?'" When the answers to those questions are clear at the beginning, the final product is far more likely to connect with the information needs of people working in the field. The result is outcomes, rather than just outputs.

And a fresh look sometimes reveals that the "audience" itself has a lot to communicate. Seeing that, a funder in reproductive health decided to initiate a monthly webinar — a conference call with a web-based seminar component — for grantees and others in the field to discuss innovative communications and organizing strategies. "A lot of innovation happens outside of the national groups," explained the grantmaker. "By letting people hear about something cool that's happening in Missouri and giving them a chance to connect and then follow up later, we were helping to build capacity and form connective tissue in the field." Each call covered a specific topic and attracted 50–100 participants.

A communications lens can uncover cultural differences and other hidden sources of miscommunication that get in the way of effectiveness. A grantmaker who funds violence prevention heard that grantees were having trouble reaching certain immigrant communities with approaches that addressed the problem "through the prism of public health." She asked a Cambodian community leader who had received an award from the foundation for advice. The community leader suggested casting violence prevention in terms of "the village" – emphasizing community cohesion — an idea that seemed sensible to her grantees and consistent with what they were trying to accomplish. As a result, the foundation hired a communications firm specializing in Asian markets to help grantees develop messages that might resonate better in the Cambodian community.

Similarly, a communications lens can help explain what's keeping people from hearing an important and perfectly reasonable message. An education funder noticed that grantees' argument that schools needed more effective principals was not getting through: "Superintendents and school districts and state education departments for the most part agree that the principal's

WHAT NONPROFITS USE COMMUNICATIONS FOR

When foundations support communications by nonprofits, what is it for? It's for these things — any of which may strengthen the organization.

- **Public education: Inform the public to change behavior (for example, stop smoking) or raise awareness about an issue (for example, climate change)**
- **Advocacy: Work with policymakers to change policy or with their constituencies to apply public pressure for policy change**
- **Marketing: Sell tickets, memberships, or subscriptions**
- **Publicity: Make visible an event, action, or issue**
- **Member engagement and recruitment: Work with existing members or constituencies; reach out to new ones**
- **Fundraising: Communicate with prospective donors to raise money**

job has to be redefined to take us into the next century," he explained, "but a lot of their stakeholders and constituents and policymakers *don't* buy into that argument — or at least they need support to buy into that argument." The funder supported a study to better understand audience perspectives and create the right messages and tools to reach them effectively.

Sometimes the issue is not the message but who's delivering it. A grantmaker who works on ocean ecology said that a grant to expand a grantee's communications capacity helped the organization see fishermen as a key audience for its work. With that insight in mind, the grantee developed a project to bring fishermen to ports to talk directly with other fishermen: "What they've found is, if you let peers talk to each other, they hear the message very differently."

In each of these instances, grantmakers and grantees looked beyond the activities of a project to the actual goals of the work. They were thus able to see opportunities to build communications into the work more directly, effectively, and creatively.

WHAT THEY DID/HOW THEY DID IT

PULLING AUDIENCES IN, GETTING RESEARCH OUT

"We emphasize research, and we actually do a lot of it ourselves," said Cathy Schoen, senior vice president for research and evaluation at The Commonwealth Fund, a private foundation that focuses on health policy issues, especially health insurance and health care quality. To increase the impact of that research, the foundation is "always trying to figure out how to get people to come back onto our website for more information."

"We know that people come onto the site initially for a specific reason," Schoen explained. "They read a research report or hear a presentation, then they go to our site to find out more or check a detail. When they get there, they see that we've got a lot of information on their topic." So far, so good — but, she continued, "How do we get them to check back when they need more information to see if we've got it? All of us, especially our communications staff, have really, really thought about that." Over the years, the Fund has built lots of tools into its website to stimulate and reward return visits: alerts that readers can customize by topic and frequency, easy-access data highlights, a mapping feature that provides state-by-state information, and carefully timed audience questionnaires that invite feedback.

One unusual tool is ChartCart, a utility that enables users to "create a presentation using Commonwealth Fund charts," as the website explains. Readers can browse a large collection of charts, arranged by topic (such as "health care quality," "equity and special populations," "international health policy"), and select a collection that downloads pretty much instantly to the user's computer. "Each chart has a full source note," Schoen pointed out — which is just good practice, but it also sends readers back to the original report: "When we release a set of charts that includes something from an earlier research report, the original report spikes up in downloads. We can actually see it happening." Currently, ChartCart draws an average of 10,000 views per month on The Commonwealth Fund website, said Barry Scholl, the foundation's vice president for communications and publishing. "This is one interactive feature we know is helping our audiences get at the information they need," Scholl said. Those audiences include a lot of people teaching college, medical school, and other graduate-level courses in health policy. It's also nice, said Cathy Schoen, "to be sitting in a conference presentation and see someone — not even a grantee — flash one of our slides onto the screen."

Developing and testing a new tool involves a "tight-knit back and forth process," Schoen said, with ideas coming from all sides — research, program, and communications staff. It's important, Schoen noted, that many members of the foundation's staff, including the president, do a lot of writing and public speaking on health reform topics. Those activities keep them in touch with the needs of their audiences, especially policymakers and researchers, and also provide a continuous flow of fresh content — reports, research briefs and summaries, charts, tables, presentations — to populate the website. "The charts would be a lot harder to produce," Schoen reflected, "if we weren't always pushing ourselves personally to synthesize and visualize information."

To access ChartCart, go to the Charts & Maps menu of The Commonwealth Fund website at www.commonwealthfund.org.

Smart Chart™ for Grantmakers

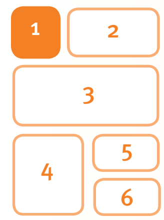
Created by the Communications Leadership Institute and Spitfire Strategies, the Smart Chart is a planning tool designed to "help nonprofits make smart communications choices." Basically, the tool walks an organization through many of the same questions a communications consultant might ask, using the process outlined in the illustration to the right.

Smart Chart is thorough, offering guidance on activities and concepts that might be unfamiliar to someone without a communications background, such as conducting internal and external scans, framing your position, or developing the "readiness" of an intended audience. It also includes a graphic organizer — a much more detailed version of our illustration — that lets planners visualize the process and record their work.

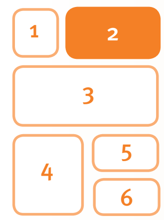
Many grantmakers recommend the Smart Chart to grantees. Some funders join grantees when they use the tool, an activity that can be helpful when they're working together to develop a communications plan and a funding strategy to match. Some funders use the Smart Chart to plan their own communications strategies — for a foundation, a campaign, a program, or a particular initiative.

The Smart Chart is available at no charge at www.smartchart.org in two formats: a downloadable print version and an interactive online version. The online version can be completed all at once or a little at a time and saved; it can also be updated as the work proceeds. For organizations that want assistance with using the tool, Spitfire Strategies offers consulting services.

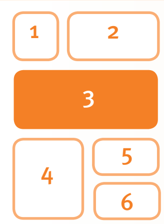
PLANNING COMMUNICATIONS: A SIX-STEP PROCESS



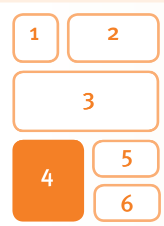
Step 1. Program Decisions
- Broad Goal
- Objective
- Decision Maker



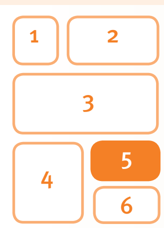
Step 2. Context
- Internal Scan
- External Scan
- Position



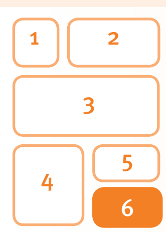
Step 3. Strategic Choices
- Audience
- Readiness
- Core Concerns
- Theme
- Message
- Messenger



Step 4. Communications Activities
- Tactics
- Timeline
- Assignments
- Budget



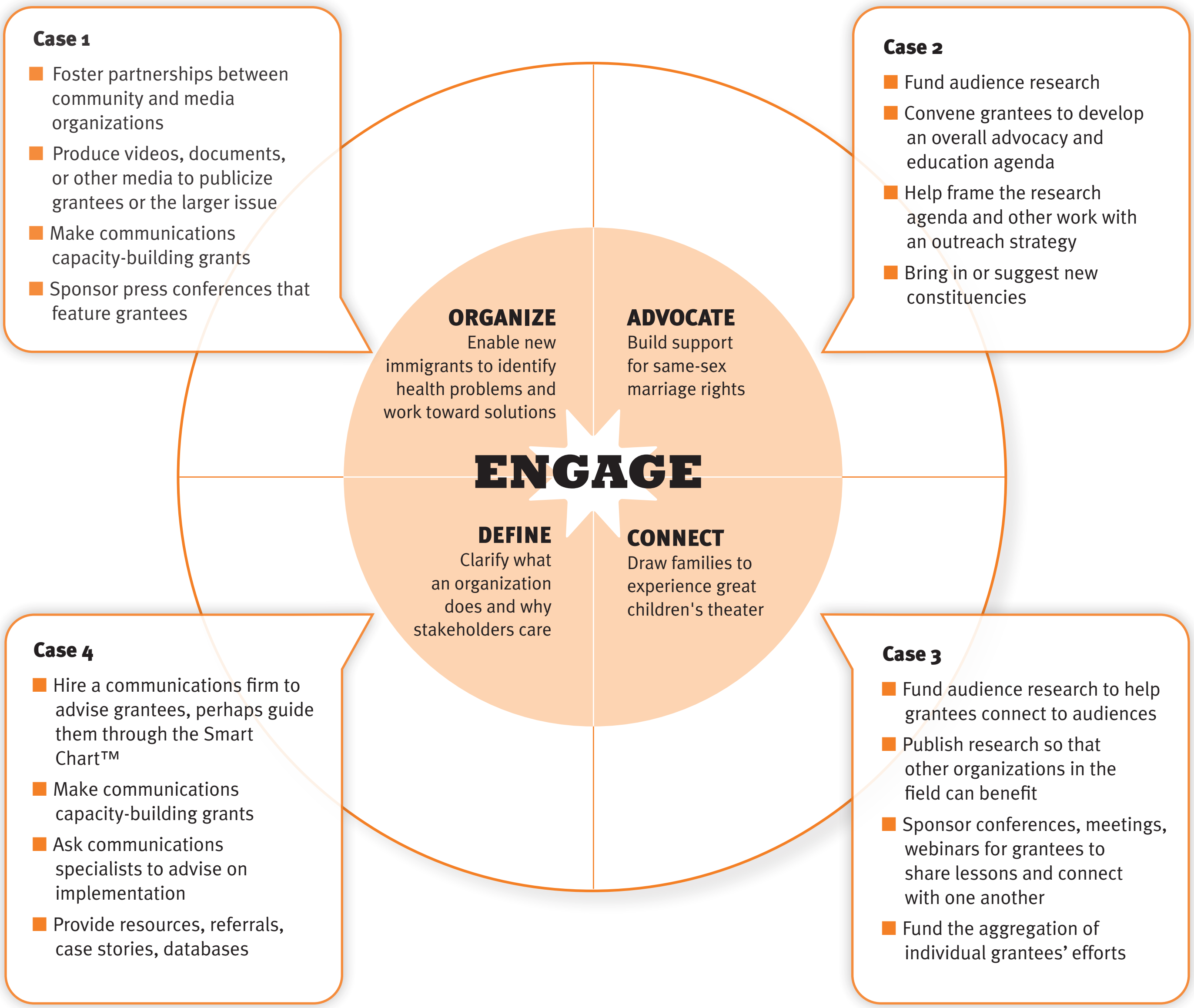
Step 5. Measurements of Success
- Outputs
- Outcomes



Step 6. Final Reality Check
- Test Your Plan

Pursuing Communications Objectives: Four Case Studies

The case studies on the following pages describe four initiatives in which grantmakers and grantees worked together to pursue a core function of communications: to organize, to advocate, to connect, or to define.



Using the four case studies as examples, this figure shows tactics grantmakers can use (outer circle) to help grantees achieve communications objectives (middle circle) that advance the real purpose: lively engagement on issues that matter. The graphic is organized in four quadrants, but the lines dividing objectives and tactics are rarely so bright or bold. Most initiatives pursue more than one communications objective, and the right mix of funding strategies might draw from several quarters.

CASE STUDY 1: ORGANIZE

NEW ROUTES TO COMMUNITY HEALTH/ ROBERT WOOD JOHNSON FOUNDATION AND BENTON FOUNDATION

The story begins in 1996, when the Benton Foundation and the Robert Wood Johnson Foundation got together to create Sound Partners in Community Health. Robert Wood Johnson's communications department funded the initiative, while Benton managed it. Benton brought considerable expertise in media and communications to the project, said Benton's program liaison Karen Menichelli, and "wanted to learn about the use of community media." For ten years, Sound Partners projects in cities around the country enabled community organizations to collaborate with public broadcasters to raise awareness of health issues. "In the early days, it was little more than public service announcements, with aggressive outreach," explained Menichelli. "Over time, it became much more tune-in kinds of programming — talk shows, telenovelas [Spanish-language soap operas], and so on."

As the program's end approached, the Robert Wood Johnson Foundation expressed an interest in extending the project, but with a twist. Focus groups had revealed that immigrants craved health information to help them thrive in their new communities. Mainstream media weren't meeting their needs, culturally or linguistically. And so, Sound Partners morphed into New Routes to Community Health, this time funded through RWJF's vulnerable populations program. A national program office, with a small staff and support from design and technical consultants, was established to manage the initiative and regrant funds to collaboratives around the country. In 2007, eight sites were awarded three years of funding and technical assistance, including webinars, grantee conferences, and more. At each site, media is being created by and for immigrants on health issues that participants themselves identify as important. The goal is to build authentic community leadership and collaboration, resulting in healthier, more informed and empowered immigrant communities.

New Routes learned from its previous incarnation in several important ways. Instead of just focusing on public broadcasting, said Menichelli, "We wanted to open it up to the whole range of media that's burgeoning now locally. The web, digital storytelling, community radio, commercial and in-language media that are popping up all around the country." She added that it was important for there to be "authentic partnerships of equals — that it wasn't just media determining the content too early, and it wasn't nonprofits and health groups purely in it for some PR." Each project included an immigrant organization to link to the target communities, a media organization to provide an outlet and technical expertise, and a high-capacity community organization to act as managing partner. The intent was to form new partnerships that would outlast the funding and demonstrate the value of working together.

"When people say community media, they often mean the local news. But for this project, community media means participatory media," said Menichelli. In Chicago's "Salud" program, Latino youth are trained in media production, create stage and radio productions on community health issues, and get audiences involved in discussion. In the Twin Cities, a collaboration called "Egal Shidad" — composed of a Somali community organization, a health organization, a community radio station, and a video network — has produced an hour-long television program on mental health issues among Somali immigrants, featuring a trickster character from Somali folklore. The initiative is using a "participatory research" model to evaluate outcomes, with each site defining its own objectives and indicators. In Chicago, for example, a sign of success was that participating youth from the 2008 "Salud" production assumed leadership roles for the 2009 season.

RWJF and Benton are interested in slightly different but overlapping evaluative measures. Benton, because of its concern with media, is looking at elements of the program model that foster leadership and collaboration and could be applied to other issues. "We asked the sites to look at evaluation not as a strict scientific process, but as what impact they're having on two levels — leadership development and community building," Menichelli explained. RWJF is more interested in the impact of social factors, such as employment or violence, on health. They agree, however, that it's as important to measure process as it is to measure outcomes. "That's how you get community buy-in," said Beth Mastin, who directs the national office. "New Routes is really a meta-communications project — a communications project to cultivate other communications projects, one that allows immigrants to start taking leadership in defining health care issues in their community and working toward solving some of those concerns, using media as a tool."

Videos and other media produced by New Routes partnerships are available at www.newroutes.org.

CASE STUDY 2: ADVOCATE

FREEDOM TO MARRY COLLABORATIVE/ EVELYN AND WALTER HAAS, JR. FUND

In 2008, California voters narrowly passed a measure amending the state constitution to ban same-sex marriage. Although the 52% to 48% vote was a blow for the gay community and its allies, the narrowness of the defeat showed a degree of progress. In 2000, a similar measure had passed by 61% to 39%. In just eight years, the dial had turned nearly 10 points in favor of same-sex marriage, one of the most contentious social issues of the day. What happened in that time? No small part of the change in public opinion had to do with work supported by the Evelyn and Walter Haas, Jr. Fund in San Francisco.

After the passage of the 2000 measure, the Fund helped to launch and became the primary funder of the Freedom to Marry collaborative, a gay and non-gay partnership working to win marriage equality nationwide. The collaborative coordinated a wide range of activities designed to reach specific sectors of the population: educating college students about same-sex marriage, conducting outreach to churches, building organizations' communications capacity, producing studies on the policy implications of extending legal protections to lesbians and gay men. The work was strictly research and education on same-sex marriage, not advocacy for any particular ballot measure or legislation.

The foundation recognized that, while the issue might be decided in the courts, public acceptance was critical to securing and honoring same-sex marriage rights. "You need to peel away the layers of people's resistance," said former Haas Jr. Fund program director and now Gill Foundation president Tim Sweeney, and address the questions that "people are really worried about but won't say out loud."

The Haas Jr. Fund also supported extensive polling, focus groups, and other research, as well as the creation of a communications toolkit to help grantees target their messages better for the so-called "movable middle," people open to persuasion on the marriage issue. The foundation's support also enabled a coalition of grantees to come together under the auspices of Let California Ring, a public education campaign that began in 2006 and coincided with the state Supreme Court's review and eventual decision finding that denying same sex couples the freedom to marry was unconstitutional.

Matt Foreman, current director of the Haas Jr. Fund's gay and lesbian grantmaking program, noted that the public education campaign "began with the goal of sparking one million conversations about marriage equality" among Californians, using a combination of community organizing, paid advertising in mainstream and ethnic media outlets, and "earned" news coverage. He added, "The campaign, which raised over $11 million, took on increased importance and urgency after the Supreme Court's pro-marriage decision," sparking a number of other foundations to join in.

"One of the great values that foundations have is that they can be at a 30,000-foot level over a field or a sector or a movement, look at all the pieces of it, and stitch together organizing, litigation, public education," Sweeney noted. "You can fund, say, 15 groups in this area, and then you can use your power of convening and capacity building. You can help people be [greater than] the sum of the parts. And that's particularly true when it comes to communications work."

CODA: After California voters approved Proposition 8, a furious debate erupted over the messaging and tactics used in the $45 million campaign to defeat the measure. Research has long shown that gay and lesbian couples are not the most effective messengers in reaching people in the "moveable middle." As a result, none of the "No on 8" ads featured gay people. Many have complained that the campaign was essentially "in the closet" and that it would have been more effective to have represented the real-life experiences of gay and lesbian couples hurt by being denied the freedom to marry. The debate raises compelling questions about values and outcomes for both advocates and funders.

Media and research reports funded by the Evelyn and Walter Haas, Jr. Fund are available at freedomtomarry.org and letcaliforniaring.org.

CASE STUDY 3: CONNECT

CHILDREN'S THEATER COMPANY OF MINNEAPOLIS/ WALLACE FOUNDATION

"Our grantees' work isn't just about selling tickets; it's about engaging people in such a profound way that they'll want to come back," said Wallace Foundation senior communications officer Mary Trudel, citing research commissioned by Wallace and the John S. and James L. Knight Foundation on building participation in the arts.

A lot goes into a decision to attend a cultural event, the researchers found, more than just knowing that it's happening. There are perceptual questions ("Is this art form important to me and my community?" "Is this experience a worthy use of my family's limited leisure time?"), practical questions ("Do I have the money to buy a ticket and transportation to get there?"), and experiential questions ("Am I going to feel welcome?" "Will it be fun?"). The answers to these and other questions guide how a person feels about the arts and whether they're likely to participate further.

To illustrate the implications for grantees and grantmakers, Trudel told the story of one organization, the Children's Theatre Company of Minneapolis. "It's a wonderful theatre, but they were having trouble filling the house," she recalled. At first, they figured the problem was practical, that they weren't offering enough ticket options, such as mini-subscriptions, or mixes of offerings at various times and days. They expanded their ticket package options, but they still had low ticket sales. Then, with help from the foundation, they decided to do some research and ask families why they weren't coming to the theater more often, or at all.

"Families said they didn't have time," Trudel recalled, but the explanation didn't seem sufficient. Families do have time, after all, to stay at home and watch television, or go out for dinner. The theatre probed further. What they found, the grantmaker explained, was that "families make time for things they see as valuable. So the theatre had to develop programs that were important to the families they were trying to reach, that would prompt parents to say, 'I want my child to have that experience, and I will make time for it.'"

As a result of the research, Children's Theatre Company artistic director Peter Brosius explained, the theater shifted its marketing focus "from the value of the production itself — the fact that it's a world premiere, the credentials of the cast and creative team, etcetera — to the value of the production for the child watching it. Our marketing copy became the imagined voice of a child describing the emotional experience of the show, or what it made the child think about."

The work itself changed, too. The theatre has continued to explore how to "transform our audience from observer to participant." They have re-envisioned the lobby "not as a loading area but something akin to a village square," where activities like poetry slams, dance performances, kite-making, and African markets engage audiences before and after the show. Inside the theatre, recent productions of ***Antigone*** and ***Romeo and Juliet*** broke the fourth wall; with chairs cleared away, audience members became villagers and were asked to dance with Romeo, hold the nurse's hat and coat, or clear out of the way as an epic fight broke out. Brosius believes the changes are having a measurable effect: "As theatres across the country have seen their subscription numbers dwindle, we have stayed relatively steady." Regular surveys, focus groups, and hand-held PDAs continue to capture audience responses.

But there's a catch, as the Children's Theater Company story illustrates: when an organization does research on what its target audiences want to see, marketing questions can bleed into programming decisions — and that makes some arts programmers awfully nervous. Their concern is that arts marketers care more about presenting what's popular enough to sell tickets than about presenting meaningful art. The foundation recognizes the tension but encourages arts grantees to rethink the "old habit where programming decides what's going on stage or on the walls, and gives it to marketing and says, 'go and sell it.' We've found that you need to have audiences in the room — if only by proxy — as you're thinking about what the 'it' is."

The foundation also supports activities to prepare audience members to appreciate art: "The more prepared an audience is, the more satisfied they'll be with the experience," Trudel explained. "We help arts organizations figure out how to engage more deeply with audiences, making them feel like 'insiders,' because once they do, they've got them for life."

Research funded by the Wallace Foundation is at wallacefoundation.org under "Arts Participation."

CASE STUDY 4: DEFINE

BE HEARD!/ WOODCOCK FOUNDATION

When Alexandra Christy, executive director of the Woodcock Foundation, asked grantees how they were getting their message out, the answer came back loud and clear: "Not well! We need your help." Christy checked to see what services communications consultants might provide, but she concluded that "our grantees were talking about needing something that didn't exist." Christy wanted to provide grantees with customized help.

In 2005-06, the foundation established a new communications program, BeHeard! The application process was intentionally challenging "because we wanted to be sure that people understood how much work it really was," Christy recalled. Woodcock selected five organizations, each of which received a full assessment by a communications consulting firm. "This is not a remedial program," consultant Doug Hattaway explained. "It's for organizations that are doing something worth talking about."

The first step in the assessment process was to conduct a "stakeholder perceptions analysis," which entailed interviewing people who represent the audiences — usually donors, but also volunteers, lawmakers, and others — that the grantee wanted to recruit. Next, consultants looked at each organization's brand, going beyond the "functional message" (what the organization does) to look at emotional appeal, social dynamics, and "aspirational message" (what drives people to become involved).

After the assessment phase, each grantee received an additional $25,000 from Woodcock to carry out a communications plan with the help of a communications consultant — the same one, or a different firm of their choice. Each grantee was required to secure matching funds upfront, at the time of the initial application, from another funding source. "The group then had a guaranteed $50,000 to implement the consultant recommendations," Christy explained, "and we had six or seven new funding partners, including Mott, Packard, and Nike, that were committed to field building in communications."

Many grantees went into the program saying they wanted to get more press coverage. What they ended up with were clearer definitions of what their organizations do and how they are perceived — and new ways to mobilize key audiences through communications. For example, Common Good Ventures, an organization that provides business advice to nonprofits, used dense consulting lingo. In the assessment process, they learned that donors and volunteers were not drawn to give or participate because of the aura of expertise; rather, they wanted to be part of a social group. "So they started to present themselves more as a group of businesspeople who devote their talents to improving their home state of Maine by helping worthwhile nonprofits," said Christy. "They immediately got a better response from their target audience."

Iara Peng, director of another grantee organization, Young People For, explained that the assessment helped identify when and why participants in their fellowship program became inactive. "When we failed to communicate with the fellows effectively — that's when they dropped out," Peng said. The organization re-thought how they were communicating with fellows from start to finish: recruitment, application, outreach, retention, and alumni community.

Another grantee, the National Institute for Reproductive Health, proposed to focus narrowly on the "framing" and "messaging" of certain issues in the pro-choice movement. Hattaway urged them to take a step back first and think about "how to talk about what we do as an organization," recalled the institute's communications director, Mary Alice Carr. With Hattaway's help, the organization clarified its objectives, defined its audiences, redesigned its website, and linked communications to program. Whereas communications previously received little emphasis in the organization, she concluded, "communications is now our compass."

Information on the BeHeard! initiative is at woodcockfdn.org. The Messaging Project of the National Institute for Reproductive Health is available at nirhealth.org.

Relationships, Roles, and Strategy

"Since everyone is a 'consumer' of communications materials to some degree, it's tempting to offer your opinion."

"Relationships matter" is a truism that applies to all grantmaking, but it's especially true when a grantmaker is collaborating with others on communications strategy. Whether the partners are grantees, consultants, or foundation colleagues, grantmakers are often called upon to treat issues of role and relationship with special sensitivity.

ON WORKING WITH GRANTEES

Several grantmakers emphasized the importance of listening, demonstrating respect, and earning trust when working through communications questions with grantees or encouraging them to use a communication lens in their work. After all, communicating involves the public face of a grantee organization and may even put its reputation on the line in a way the foundation's is not.

A communications consultant reminded grantmakers: "Since everyone is a 'consumer' of communications materials to some degree, it's tempting to offer your opinion. It can be helpful for foundation staff to weigh in," but be clear that you're making suggestions. Drawing on his own experience, he reflected further on the importance of negotiating role and expectations clearly in advance: "It's incredibly important for me to talk with the nonprofit about exactly why and how I would like to promote their work. I don't assume they will fully trust my intentions."

Here's some more specific advice:

Wait for buy-in. "Rethinking communications can be both time-consuming and threatening to the status quo for some nonprofits," said a communications consultant, and funders may have to "sell" the idea to grantees. "They may believe that investing in marketing means taking resources — including their time — away from their program work." Her advice: "The organization's heart needs to be in this for it to be worth doing, and you don't want any group just going through the motions to make a funder feel good. For any number of good reasons, it may just not be the right time." It may be helpful to share case studies or other materials on the value of communications and let the grantee know you're willing to talk further when the timing is better.

Signal your interest. A lot of nonprofits are interested in communicating strategically, but they don't think funders are interested in supporting them to do it. If you're willing to explore communications as strategy, raise it with current grantees or with organizations working in your field or community.

Aim for balance. When a campaign or other initiative involves several organizations, grantmakers can help the partners strike a mutually agreeable balance between individual and group work by convening them to strategize together, giving extra funds to help them maintain their own identities within the context of the campaign, or encouraging them to find ways to participate that suit their needs and priorities. A health funder talked about the need to balance local and national priorities within an initiative involving multiple stakeholders in more than a dozen cities: "Communities need to operate in their own unique spheres, but there are times when they need to be connected in order to have a bigger impact."

Anticipate cost. As valuable as communications can be, it does cost money. A grantee may rightly feel that every dollar spent on communications is one dollar less for programs or operating support. Or a communications review may reveal a deeper problem with a nonprofit's mission, strategy, or operations — a problem that costs the grantee money to address. Then there are the costs of implementing communications activities and monitoring progress, the time and attention of an organization's leadership, and unanticipated out-of-pocket expenses. "From the get-go," said a communications consultant, "grantmakers should plan for how they will support grantees' implementation of any [communications] plan, ideally with grant dollars and potentially also with connections to good sources of advice, design, and so on."

ON WORKING WITH COMMUNICATIONS STAFF

They're not exactly from different planets, but program staff and communications staff (or consultants) are at least sometimes from different sides of the fence.

Program officers are experts in their fields or communities; their knowledge often springs from a deep well of study, work, and life experience. They recognize the complexity of a problem and know that solutions must address that complexity. They can feel alarmed when a research report they've funded is reduced to a few sentences. One program officer put it this way: "'Spin' and 'messaging' can sometimes make it feel like the nuance is lost. The story gets *too* simplified." A common tension around communications for program officers lies in the winnowing of content that communications officers often seek in an effort to make a message simpler and more compelling; program staff may feel that complex problems can only be reduced so much. On a more personal level, program officers may also feel that communications professionals undervalue their programmatic expertise and experience.

Communications officers and consultants know how to get a message across; they're knowledgeable about how a message is going to be received and how to make adjustments that make it more effective. It's not just that they know how to create a sound-bite or have good contacts with the media. Imagine their frustration when an excellent piece of research is delivered to its intended audience in a form that fails to make it accessible, clear, relevant, or compelling. Communications officers don't often have the comprehensive issue expertise that program staff do, but they are personally and professionally committed to solving the same social problems as their program colleagues. Both parties bring essential expertise to the challenge of communicating effectively. "Our roles differ a lot," said a program officer regarding her colleagues in the foundation's communications office, "but we're working on the same initiatives and have the same goals" for the foundation and its grantees.

Asked for advice about how to work better across the program-communications divide, foundation staff offered tips that may seem obvious. Their point is that it's the easy stuff that sometimes gets overlooked:

"'Spin' and 'messaging' can sometimes make it feel like the nuance is lost. The story gets *too* simplified."

Join forces. Look for opportunities, contributors said, to build contact between program and communications staff into grantmaking routines. It pays off, said the president of a communications firm, in the quality of decisions: "When program and communications staff are regularly asking questions [about communications strategy] together, they come up with better answers, and answers that work for both of them." At one foundation, the vice president for communications sits in on all major programmatic strategy discussions. At another, the communications officer encourages program staff to check with him for tactical advice, "which might mean sitting and looking at their grants, or thinking about how a webinar or other media tool might help." Ideally, the relationship involves continuous exploration of communications questions throughout the process of developing program strategy.

Clarify roles. As much as possible, try to reach agreement on roles and responsibilities for everyone involved in a communications activity or initiative: grantees, program staff, communications staff, and consultants. Who takes the lead in message development, outreach to audiences, press relations, consultant oversight? Who reviews materials at what stages? From whom is sign-off needed? By establishing guidelines, the various parties are less likely to encounter misunderstanding or duplicate each other's work.

Establish shared objectives. Work through major goals, and figure out how to express them so everyone understands what's most important. "There's been a huge movement on the part of our board for accountability on results," said one grantmaker, "which means that all areas — our research area, our program area, and our communications area — have needed to work tightly together to figure out what the indicators of success should be."

ON WORKING WITH STAFF FROM OTHER FOUNDATIONS

Sensitivity to roles and responsibilities is also important when developing or executing communications strategy with other funders. A grantmaker who is considering a new initiative explained that she must walk a fine line if she wants to get other foundations involved. "We want to start telling the story [of the initiative], but we don't want to make it seem like a done deal so that other funders are less likely to participate."

Funders who are part of existing initiatives face related challenges. "We each have specific agendas," said a health grantmaker who has partnered with public and private funders on a disease eradication campaign. The collaborative is structured so that each funder can make its own contribution to the goal while also trying to coordinate messages so as not to become fractured. They meet regularly and recently got together for a half-day session to decide on messaging and draft a communications plan. "Everyone has a role," she explained, based on their foundations' strengths and preferences. Some work on health policy, others on grassroots prevention campaigns. Some take a strongly partisan stance on policy issues, others avoid controversy. Some have expertise in web design, while others are good with press relations. The point of having a collaborative, after all, is to pool resources to maximize impact.

Grantmakers offered a handful of tips that make collaboration easier and more productive:

Start by soliciting input. One grantmaker hired a communications consultant to solicit input from colleagues at other foundations about a possible initiative — not yet asking for money, just their thoughts.

Connect through grantees. A foundation that offered communications capacity-building grants to a small group of its grantees required them to secure matching funding upfront. The grantmakers who initiated the project then intentionally built relationships with each of the match funders. The effort helped them develop contacts among funders who shared their commitment to strategic communications in key program areas, such as climate change.

Play the peacemaker. When multiple grantees are involved in a campaign or initiative, funders can be helpful by agreeing in advance on certain expectations and pledging not to get involved in turf battles. A grantmaker who is involved in a coalition that includes moderate and not-so-moderate groups added this note: "As funders, we're sometimes very direct about what we think is good behavior for us and our grantees — not trashing each other, for example. The stakes are just too high."

Making the Most of Consultants

Of the thousands of funders nationwide, relatively few have dedicated communications staff. Others that need communications expertise — whether for their own programs or for their grantees — may decide to hire outside strategy consultants, web designers, PR firms, or other communications specialists. We asked our contributors how to choose the right firm, and how to economize.

One grantmaker stressed that consulting candidates should have experience in the work being proposed. It's not enough to have general experience in communications, or deep experience in, say, press relations if the job is to assess grantees' communications capacity. "When possible," added a communications executive, "it's best to have a firm that can do both the big-picture thinking and then the tactical execution."

Not just the firm, but the individual people at the firm you'll be working with are important, noted a consultant. He suggests that grantmakers ask not only for a breakdown of the tasks involved but also who will be doing the work. Junior people may be assembling media lists, handling logistics, and generally keeping everyone on the same page, while senior people are more involved in formulating strategy. All those roles are essential to the quality of the work and the working relationship.

Several grantmakers and communications consultants suggested "bundling" communications work to save money without compromising quality. In one case, a consulting firm was hired to get more women pundits represented in stories by major news outlets. The firm assembled a database of women commentators, working in many different organizations and fields, and promoted their names and expertise to journalists who needed quotes for stories or networks that needed commentators on air. This arrangement was far more cost-effective than having individual women's organizations pay for consulting.

New Media and Bottom-up Communications

Call it participatory communications, interactive communications, or something else entirely: whatever you call it, there's something new going on, and it's definitely multidirectional. It's about not just communicating *to* but communicating *with* or *among*. And new technologies may be driving the change.

"Over time," said the president of a social cause communications firm, "we've talked a good game about how we don't want top-down communications, we want bottom-up communications. Now social media means that bottom-up communications is officially possible without convening grantees in a ballroom in some city." By "social media," she means everything from YouTube videos to wiki pages to social networking sites and blogs. People in the digital age increasingly expect to create, share, challenge, and take part. They can comment on blog posts, contribute to wiki pages, and act immediately on messages in ways that analog media never allowed.

But does multidirectional communications mean giving up control of your message, or make you just another voice in the crowd? Not really, said a communications expert. New media technologies can help grantees and foundations advance change by expanding the "base of participation, in terms of who your messengers are." Social media channels are also "powerful listening tools," noted a consultant. "They provide a venue for grantmakers to listen to what is being said about an organization or an issue before starting a new initiative or during implementation to monitor changes over time."

Social media "messengers" may need to be prepped, grantmakers said, especially when a medium is really new and the rules of engagement are unfamiliar and changing. A foundation-supported journalism program hosted a conference at which each session had a live Twitter stream of questions and comments projected on a screen behind the presenter. The grantmaker sat down with the conference presenters and bloggers in advance to think through how the Twitter stream would work. They came up with ways

	Old paradigm	New paradigm
Purpose	Persuade or educate	Enlist, mobilize, listen
Foundation's role	Authority	Facilitator
Others' role	Audiences	Stakeholders, participants
Feedback	Limited	Encouraged, incorporated into design and execution
Mechanism for involvement	Satisfaction survey or rating sheet at the end	Conversation throughout the process

to address audience expectations and get the comments flowing. "When you're doing new things like this," she explained, "you have to make it clear that risk-taking is acceptable. Not everything is going to succeed."

Fortunately, said a communications professional, program officers don't need to be experts on new media technology, which is changing every day. They just need to be clear on their strategy; staff or consultants can provide the knowledge and support needed to make the most of social media. A grantmaker agreed — up to a point: "We're in an era of constant technological change, and it requires continuous professional development. We don't have to be ahead of our grantees, but we can't be behind them." For him, that means using the same online applications his grantees are using. He doesn't push grantees to use particular new media tools: he doesn't insist that they use Flickr or Twitter, for example, to share photographs or news updates about their work. But he does ask them to use a common "tag" or keyword on whatever online platforms they use so their work can be assembled or connected.

Grantmakers like this one also try to encourage communication back to the foundation and across a community of common interest. For example, the foundation hosts a blog about online learning — one of its major program areas — and invites grantees and other guest bloggers to post writing, links, audio, and video.

WHAT THEY DID/HOW THEY DID IT

HELPING A GRANTEE'S CAPITAL CAMPAIGN WITH A VIDEO BLAST

To help grantees use video effectively, the Frieda C. Fox Family Foundation created VirtualSiteVisit.org, where organizations can find tools and advice for nonprofit mobile media. Dana Marcus, executive director of the foundation, described an early project to assist a transitional program for young people aging out of the foster care system whose capital campaign had stalled and was running out of time.

"With six weeks to go, Kim Golter, the director and founder of Jeremiah's Promise, called to brainstorm how to raise the final $90,000 of a $500,000 challenge grant. I suggested sending out a short video by email, with a compelling plea and a 'donate now' button. I asked Rachel Fox, the foundation's media expert, to edit JP's existing video from 12 minutes to 3 minutes, incorporating new text and foster youth statistics that Kim provided. Within ten days, she had created a fundraising webpage with a 'real-time' fundraising thermometer, and had the e-blast ready to go. We also featured the JP challenge on our foundation's own homepage, all a cost of under $1,900 (including data monitoring for the month)," said Marcus. "Jeremiah's Promise raised a little over $90,000 by the deadline," said Golter of the experience. "The video e-blast was a great tool, and the teamwork between the foundation and JP was amazing."

"Most donations were correlated to the video blast. But some came in by mail or pledge and not through the donate now button," Marcus pointed out, "so, I hesitate to say all were directly attributable. Noteworthy, though, we bought a $200 Google ad using key words like 'emancipating foster youth,' 'help,' and 'donate' and used the video blast as a landing page. The ad brought in a single, unexpected donation of $10,000 to the campaign. Pretty good investment."

For Jeremiah's Promise and other nonprofit video case studies, see VirtualSiteVisit.org. To learn more about how keywords work and a tool to help generate effective words, go to adwords.google.com.

NEW MEDIA CASE STUDY: CATALYZE

ACTIVE VOICE AND "INTERDEPENDENT" MEDIA

Since the 1980s, hospitals, museums, public TV stations, and other community-based institutions have used an approach known as "outreach" to promote their services, explained Ellen Schneider. But useful as the "outreach" model is for certain kinds of promotion, it's still unidirectional. Schneider's organization, Active Voice, works to engage people in more open dialogue by using film and other media to put a human face on public policy. "We're not satisfied anymore with just telling people about the stories, then asking them to watch the stories, come to a screening," she said. "We want the stories to be part of an ecosystem of change." Active Voice is not a funder, but it is inspiring grantmakers to think in new ways about how to spark civic dialogue.

Take the example of "A Doula Story," a film by Danny Alpert about a birth coach in Chicago who serves teenage mothers, many of whom are alone and scared. In partnership with the Kindling Group film production company and the Chicago Health Connection, Active Voice used the film as the centerpiece of a campaign to activate grassroots groups and policymakers in support of doula programs. Active Voice organized screenings in six communities around the country that were considering establishing doula programs. The organization brought together small groups of hospital administrators, funders, and teen advocates and used the film to get a discussion started about what it would take to get programs going in their own communities, what assets they had, what obstacles they faced, and where funding would come from. Some are planning to set up local programs.

Active Voice also presented the film to policy audiences. "Now, was it the clip of 'A Doula Story' shown at the National Press Club that prompted the federal government to fund replication of the Chicago doula program?" asked Schneider rhetorically. "Of course not. But it was a vivid tool that brought policymakers and the press into those delivery rooms. That's one of the reasons why this medium is so powerful. It takes people where they would not otherwise go." With the help of a good "engagement campaign," a film has the power not just to move people emotionally but to move them to action.

It's a power funders are increasingly coming to recognize — especially, Schneider noted, as video replaces text as a key form of communication. What Active Voice offers, a grantmaker explained, is "multiple levels of engagement" beyond the film itself, such as community forums, interactive presentations online, or short versions of the film that can be screened in classrooms or other settings. Ideally, he said, the engagement campaign "is baked into the project. The film should have a shelf life of its own, but an organization like Active Voice helps build and engage audiences."

Schneider understands some grantmakers' reluctance to fund film or engagement campaigns. "It can be hard to measure exactly how it contributes to your portfolio. It does require some leaps of faith." Those leaps may be getting shorter, thanks in part to extensive research by Active Voice on how film can have the biggest impact.

Active Voice is also examining collaborations, and how to structure them most productively, through its Interdependent Media project. One tactic they've used is to bring advocates, funders, and policy advisors into the conversation early on in the development of a film to inform the process and increase the ultimate impact, without compromising the filmmaker's independence. Advocates and community organizations become invested in a film from the beginning; later on, they get a great story to galvanize their stakeholders.

The Interdependent Media model works especially well, said the grantmaker cited earlier, if the interests of the funder, filmmaker, and advocates are aligned. However, he cautioned, "funders should know what they're getting into. It's not just money; it's a commitment of time and effort to the intellectual process." The payoff, however, can be dramatic. By using film engagement campaigns in tandem with other strategies, "you're moving your issue in different ways."

"PRE-NUPS" FOR FUNDERS AND FILMMAKERS

We asked Active Voice's Ellen Schneider for tips grantmakers ought to keep in mind as they consider funding a documentary film or other media project. Here's her advice:

- **Your objectives.** Ask yourself, why a film, as opposed to a different resource? Then start thinking early about what you're seeking in terms of target audiences, budget, involvement of other funders, editorial control, and other matters. "That way, you can have a productive conversation with filmmakers."
- **Your issue.** Filmmakers may not grasp the needs of a funder who is mainly interested in a particular policy issue, rather than media more generally. "Help them understand your program, and it will go more smoothly."
- **Contingencies.** "Real-life stories rarely go as planned. That's part of what makes documentary film so exciting, but it can be unnerving for funders who are laying out a lot of money and need to show outcomes."
- **Public television.** For a film to be eligible for broadcast on public television, the filmmaker must have complete editorial control. "The funder yields control in this case, but the film may now reach a huge audience."
- **Put it in writing.** Of course you trust each other, but issues like editorial control, the review process, ownership, and distribution should be addressed in a contract or MOU.

For additional advice, case studies, and information on current foundation-supported initiatives, see www.activevoice.net.

Guest bloggers attract new web traffic and keep the site diverse in its content, while the foundation acts as a coordinator and editor. The blog serves as an ongoing conversation throughout the program's life.

Yet we also heard words of caution. One foundation put videos about grantees on its website. The grantmaker who initiated the idea was delighted — until web traffic statistics showed that only a tiny fraction of visitors actually clicked "play," and those who did watched less than 20 seconds on average. Online videos may still turn out to be a useful tool for the foundation, but first the grantmaker intends to revisit his reasons for wanting to post them, establish targets for who and how many people will watch them, and figure out how to motivate them to watch.

However you decide to use new media tools, remember that the fundamental questions of sound communications strategy still apply: *What are my objectives? Who am I trying to reach? What do I want them to do? What is the best way to reach and engage them?* And finally, *Is social media the most effective way to do so?* Traditional communication tactics are often more effective than new media; both are ideally just tools in a well-stocked communications toolkit.

A foundation communications director voiced a similar message: "We always try to remind ourselves when we use the latest technologies — whether we Twitter or blog — that it has to be in the service of our mission. It's easy to communicate for communication's sake, especially with all those gadgets that are out there." Or, as another communications officer put it, "We don't want to do things just because they sound sexy."

Evaluating Communications

"Communication is much more measurable than people think," said an evaluator who often helps assess communications efforts. It's not easy, she conceded, to establish causation or to isolate a particular foundation's contribution to a change, but the difficulties "don't take away from the fact that you can learn how to do what you're doing better" and find out "whether you've made a contribution toward a certain outcome."

Grantmakers echoed her arguments: it's impossible, they said, to know with certainty just how much a certain set of communications activities contributed to, say, a drop in childhood obesity or the adoption of new federal health policy. But you can get a pretty good idea of whether the activities you've supported have reached your intended audiences and had the desired effect on them. Our contributors suggested the following steps for measuring the effectiveness and impact of communications efforts.

- **Establish clear objectives.** Before you start, name the outcomes the communications activities are intended to achieve. Once those are identified, it's possible to monitor progress, make midcourse corrections, and assess results. Articulating the theory of change is especially important, a communications consultant noted, "in cases — and it frequently *is* the case — that it's simply not affordable to evaluate more than outputs." Specific, measurable objectives agreed to by all key stakeholders from the start are essential to successful communications activities.

- **Determine how many people — and who — received the communication.** Strategies for figuring this out include commissioning surveys of target audiences, monitoring website visits and page views, tracking distribution of newspapers where advertisements are placed, or attendance at community meetings. At issue here is not just the number of people who receive a given communication, but whether or not they can make a difference in effecting the desired change. Were they the audience you were trying to reach, as laid out in your objectives? A stop-smoking ad campaign may reach a million people, but the only ones who matter are smokers and the people who influence them.

- **Estimate how many people — and who — took action based on the communication.** There are two primary ways to approach this: quantitative studies, comparing test groups of people who received the information against control groups of people who did not receive the information; and more qualitative approaches, such as surveys, interviews, and focus groups. Since responses to information are often idiosyncratic, qualitative methods may give grantmakers a better sense of whether or not communications activities had the intended effects. Qualitative approaches are also more likely to pick up secondary, unforeseen, or unintended consequences. It's essential to conduct some precommunication research or baselining to know if you've moved the needle — just one of many reasons why communications needs to be built into overall program strategy at the start, rather than the end, of the process.

- **Track and differentiate impacts over time.** An evaluation plan may specify impacts in the short, medium, and long term. Short-term measures might include things like attendance at a play and post-show Q&A with the director, votes cast on a ballot measure on a topic addressed through a public education campaign, or an up-tick in an organization's donations or volunteers in response to advertising. In the medium term, a grantmaker might extend those measures by looking at, for example, the theater company's attendance over an entire season, changes in public attitudes beyond the ballot vote, or further growth in the organization's donor and volunteer base. Long-term effects might include the theater's increased financial stability or audience diversity, the diffusion of an idea into a target audience (and perhaps even a corresponding quantitative impact, such as a drop in teen driving accidents), or growth in the number of organizations or communities working on a particular issue. Some activities or initiatives are intended to achieve only short-term goals. But the longer a communications activity goes on, the more grantmakers may look for messages to spread, and networks and organizations to become stronger.

- **Assess the quality of relationships.** Effective communications is not just about the message being sent and the impersonally titled "end user." It's about relationships that pay off in a variety of ways, including stronger networks and better-informed constituencies. A funder who supports documentary films that are designed to increase public engagement with policy issues said that he learns a certain amount from attendance numbers and other similar metrics. What's harder is to capture is the *feel* of the work — the mood as people from different groups watch a documentary film together and discuss the issues. "I think we miss an opportunity in those moments where people are in the room, working through [something] — there's an energy that takes place there, a story that's being told that could be very useful to us as funders." Ethnography can be helpful here, especially for evaluating long-term social change. Film, radio, and other media can also help document the quality of relationships and "make the whole process less abstract," the grantmaker concluded.

A nonprofit communications guru offered grantmakers three pieces of practical advice for evaluating communications work. "One, define success up front — and it has to include numbers. Two, put measurements in place, so you're actually able to measure for it. And three, look at it regularly. Some of your metrics are going to be off, for whatever reason — you picked the wrong channel to motivate people, the wrong message, the wrong messenger — and you'll want to be able make mid-course corrections."

THE COMMUNICATIONS NETWORK: IT'S FOR PROGRAM STAFF, TOO

The Communications Network has a new evaluation toolkit, *Are We There Yet?*, which it developed for its members. Speaking of which: program staff who want to learn more about communications are welcome to join the network, use its resources, attend conferences, and sign up for regular webinars. "Many foundations have institution-wide memberships," a communications director noted, "which means that all staff have access to the online resources."

Resources

"Smart Chart"™ by Spitfire Strategies. Available in print or online interactive editions, the Smart Chart™ is a planning tool that helps nonprofits develop high-impact communications strategies. The tool is also useful for grantmakers to develop their own program communications, and evaluate grantees' communications strategies. Available at www.smartchart.org.

"Are We There Yet? A Communications Evaluation Guide" by Edith Asibey for the Communications Network. The guide provides a step-by-step method for evaluating communications work, using a structure similar to that of the Smart Chart™. The guide and a related webinar are available at www.comnetwork.org.

"Prenups: What Funders and Filmmakers Should Talk About Before They Tie the Knot," by Active Voice. This guide, available in online and print editions, identifies the key areas that grantmakers and filmmakers should discuss to enjoy successful working relationships. Available at www.activevoice.net.

"Storytelling as Best Practice," "Why Bad Ads Happen to Good Causes," and other publications by Andy Goodman. The publications show public interest organizations how to tell stories, design print/web communications, make presentations, and develop strategy. The publications, and a monthly e-newsletter called "free-range thinking," are available at www.agoodmanonline.com.

"Proving Your Worth: 10 Ways to Measure the Impact of Your Communications," by Fenton Communications. This guide for public interest groups discusses how to link communications to impact, using such measures as growth in fundraising or membership development, introducing new words into the lexicon, and more. Available at www.fenton.com.

"Is Your Good Work Going Unnoticed? Seven Mistakes That Foundations and Nonprofits Make (and How to Fix Them)," by Clear Thinking Communications. The paper discusses such mistakes as shying away from controversy, being afraid to look dumb, and talking your own language. Available at www.clearthinkingcommunications.com.

Ways to Use This Guide

To push your thinking about communications to another level, try these activities:

Talk about your foundation's voice. Use our feature on page 3 with colleagues or your board to explore activities or traditions that are emblematic of your foundation's reputation. Name some relationships that have been forged through meetings or other activities by your foundation over the last few years. Audit in-house resources – other than grantmaking – that your foundation has used to help advance an idea or enable an action.

Learn what your grantees already know. Ask your grantees what they're doing to engage their audiences and promote their work. When we polled users of GrantCraft about how their grantees use new media, many grantmakers told us that they hadn't asked grantees how they're using media in their work. Grantees, however, had many insights and examples – hidden in plain sight. A simple survey about communications may open up new information and spark funding ideas.

Act your way into thinking about using a communications lens. Take a look at a few proposals you might fund or programs you've just begun and ask yourself and your grantees who needs to be engaged to make the work effective. Brainstorm what type of grant might match the need. Take a look at cases in this guide to see if any of their goals match yours and ask what you can learn from that.

Tell war stories. Bring experienced grantmakers together to talk about good grants that failed to engage or get their story across. Brainstorm what you might do if you had a chance to do it again.

Get educated. Fund your regional association or an affinity group to host a training session on new media and social impact. The resource list in this guide includes people and activities that might be part of the conversation.

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For additional guides and other materials in the GrantCraft series, see www.grantcraft.org