

Authentic Voices for Change:

A Landscape Analysis of **Communications Best Practices**
and Related Strategies for **Maximizing Grantmaking Impact**

PREPARED FOR UNBOUND PHILANTHROPY

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Introduction and Executive Summary

Mapping the communications landscape in philanthropy is complicated work. No two foundations are alike. Each grows and develops at its own pace; each has different objectives, strengths and opportunities for impact. So, too, with a communications strategy. Credibility must be earned over time. Communication interventions that work for one grantmaker may not be wise for another. Every organization has to chart an authentic, unique course and choose wisely where to invest its finite reserve of authority and credibility.

That being said, trends and best practices are now well established in the field of philanthropy communications that can help foundations significantly extend their impact and reach. With increasing resources and attention now focused on the art and science of communication, foundations have an opportunity to learn from one another and from the evolution of communications practice over the last several decades.

As Unbound Philanthropy refines and strengthens its program strategy, this is an opportune time to also think carefully about how the foundation can best leverage strategic communications to achieve its goals over the long term.

A number of questions quickly emerge. For starters: What inherent strengths, or potential strengths, does the foundation have for using communications to magnify its programmatic impact? What communication strategies are effective foundations consistently employing, and to what end? What lessons can be learned from other funders doing similar work—on immigration specifically, or social justice more broadly?

To help answer some of these questions and establish a framework upon which Unbound Philanthropy's leadership can make informed decisions, Brotherton Strategies explored the communications strategies of a dozen foundations:

- The Barrow Cadbury Trust
- Carnegie Corporation of New York
- The Fledgling Fund
- The Ford Foundation
- The Evelyn & Walter Haas, Jr. Fund
- The MacArthur Foundation
- Ms. Foundation for Women
- Northwest Area Foundation
- Rockefeller Brothers Fund
- Trust for London
- Zellerbach Family Foundation
- The Public Welfare Foundation

Representing a cross-section of the philanthropic landscape, most of these foundations are headquartered in United States; two are based in the United Kingdom. Many are small- to medium-sized philanthropies, with annual grant budgets of \$25 million or less; several have endowments well into the billions. A majority are focused on social justice issues; a few share Unbound Philanthropy's direct focus on immigration (see Appendix B for foundation profiles).

Through a combination of web-based research (Foundation Center, Nexis, the foundations' own websites and social media accounts) and interviews with senior communications leaders inside each organization, we explored how these organizations think about and prioritize their communication work. We looked for strategies and best practices that are employed across multiple organizations. And we noted unique, replicable approaches that could help inspire or inform Unbound Philanthropy's work in new ways. Three primary themes emerged from our research:

- **Foundations have a unique communications role, and a growing sense of obligation to leverage their voices strategically.** Foundations are distinctively positioned to deploy their expertise and authority to extend the impact of their grantmaking portfolio and advance their programmatic work. They have credibility, access, and leverage that few, if any, other organizations (nonprofit, for-profit, or public) can claim.
- **Brand, message, and audience matter. Like any communicating organization, foundations should start with these basics.** The communications leaders we spoke with manage their organization's reputation and identity with care and purpose. In these over-mediated, hyper-digital times, funders need to be increasingly mindful and deliberate about how they show up in the world, the stories they choose to tell, and the partners they keep.
- **Communications challenges are commonly experienced, but not insurmountable.** Nearly all the foundations we spoke with share concerns about transparency, control of message and frame, and negative repercussions that can come from taking a stance on socially or politically controversial issues. By participating collaboratively with others in a movement for social justice, however, foundations have found that many of these risks can be mitigated or minimized.

We also heard with consistency across more than a dozen interviews what effective foundation communications is, and what it is not:

Effective communications is not ...	Effective communications is ...
Advancing the foundation's name for its own sake or simply to become a "household name."	Building recognition, reputation, visibility, and relationships in order to advance social change.
Taking credit for grantee or coalition accomplishments.	Amplifying the stories of grantee and coalition accomplishments.
A traditional publicity strategy focused on media clips, broadcast impressions.	A strategy that focuses substantively on advancing program goals.
Targeted to a vague, unspecified audiences like the "general public."	Intended to inform, educate and influence targeted audience groups like grantees, funders, and policy makers.

PART 1: The Unique Role of Foundation Communications

Social justice issues are as much a matter of culture as they are public policy. Policy is informed and shaped by attitudes and public opinion, and public policy gains last when they become norms. In order to advance social justice issues, movements must inform and educate the public, influence public opinion, and advocate with policy makers. For these reasons, strategic communication is a necessary part of any social change.

Many of the funders we spoke with see themselves as part of a movement for social change. Thinking of themselves this way means thinking about how to be respectful, effective, and helpful partners with other movement members, such as grantees and fellow funders, and to reflect on how they are adding value to the movement with each dollar or hour they invest.

This frame raises important questions for foundation communications: What is the role of funders in communicating to advance these causes? Do funders have a communications role of their own, beyond funding and promoting their public charity grantees? And what are the legal limits on foundations' activities to inform, educate, and advocate?

“We’ve always seen ourselves as part of a movement, and we have a responsibility to move issues beyond just grantmaking. We have a responsibility to be responsible movement advocates ourselves.”

— Irene Schneeweis
Ms. Foundation for Women

We heard that foundations do have a critical role to play in communicating for social change; and in fact, it is a role that only philanthropy can fill. Foundations are uniquely positioned to deploy three strategies, in combination, to advance public opinion and public policy:

- Build individual grantee communications capacity and elevate their stories.
- Convene grantees and funders around a communications platform.
- Leverage the access, learning, and credibility of the foundation itself.

Foundations are uniquely positioned to implement these strategies for a number of reasons. Often, they have a point of view that is informed by their unique connections to multiple grantees working in different ways on a single set of issues; this vantage point allows them to simultaneously act as a bridge builder, a clearinghouse of best practices, and a central repository for effective messaging and framing. Foundations also enjoy a unique level of access and influence with two other key audiences: fellow grantmakers and policy makers. And finally, they have the resources that most nonprofits lack to invest in message research and development, giving them the ability to shape conversations critical to the public discourse and policy environment.

It is clear that effective foundation communication is not about self-promotion; rather, it is an integral strategy for advancing program goals for social change. The prevailing criteria for decision-making about foundation communications is not whether it advances the foundation. Rather, the key question is: does communication advance the movement for social change?

EXAMPLE:

The Ms. Foundation for women is currently working with a communications consultancy to develop new messages and strategies to end child sexual abuse. They are “working in parallel” as they (a) build individual grantee communications, advocacy, and organizing capacity, (b) fund communications assessment and training across a coalition of grantees, and (c) develop their own institutional messages and communications on this issue. By investing in multiple, mutually reinforcing ways, the Ms. Foundation is building communications capacity so that ultimately grantee organizing and advocacy is as effective as it can be.

According to Ms. Foundation senior manager for strategic communications Irene Schneeweis, “We are working jointly and in parallel in the area of child sexual abuse. The Ms. Foundation is trying to find out how we best communicate on this issue at the same time that our grantees are working on figuring this out. So the message research informs the work of the institution, the grantees, and capacity building for the movement.”

Building Grantee Capacity

Building capacity—and expectations—for grantee communication is an effective strategy, and one that is employed by many of Unbound Philanthropy’s counterparts. The reason it is so effective is that grantee stories are compelling. Good storytelling helps to translate wonky or politically sensitive policy issues into familiar narrative structures that are essential to shaping attitudes and beliefs. Grantees typically have access to the stories of how the work is making a difference in people’s lives, and those stories bring texture and life to the metrics and data of grantmaking.

Foundations recognize that elevating the work and stories of the grantees is far more important than communicating about the activities, grants, and strategies of the foundation. In fact, many of the foundations we looked at went beyond elevating just the grantees’ work to emphasizing the “voice of experience”—the voices of people and families in the communities for whom the foundations and their grantees intend to create a better world.

Foundations have a unique capacity to see and communicate the big picture and tell stories across a variety of initiatives and projects. Few others are in a position to look across the field or invest the time and attention required to tell stories well.

Foundations find that investing in strategic communications is a mutually reinforcing strategy that is helpful to grantees and advances program goals.

Activities that help grow grantee communications capacity include:

- Build communications strategies and expectations into grants.
- Provide funding for grantees to develop their brand, deepen their use of social media, conduct audience and message research, and develop content, or even advertise.

“You’ve got to figure out, what gives you the right to be speaking on this issue? Should you be pushing the voices of the voluntary organizations you fund, and maybe not just them but the voices of experience, so the migrants and refugees themselves, rather than you as a funder. We’re trying a mix of all three really. We are looking at what we should be saying, how we can build the capacity of voluntary organizations, and how we can build the voices of those who are the poorest in society.”

— Mubin Haq
Trust for London

- Provide in-kind communications services to grantees such as help with websites, news releases, and pitching stories. This type of technical assistance is often outsourced to consultants when the foundation's capacity is limited.
- Follow and repost grantees' social media posts. Think of social media not just as a microphone for the foundation's own voice but also as a vehicle for keeping up to date on grantees' messaging, progress, and key priorities.
- Encourage grantees to develop their own story banks and to contribute to the foundation's story library; feature monthly or quarterly grantee stories on the Foundation's website and other communication channels.

EXAMPLES:

The Evelyn and Walter Haas, Jr. Fund has embraced storytelling and has partnered with the nonprofit publisher, Voice of Witness, to develop stories about individuals affected by the policies that the Fund and its grantees work on. These "First Person Stories" are based on extensive interviews with the subjects, who range from young immigrants who were brought to this country as minors ("DREAMers") to gay men and lesbians seeking equal treatment under state and federal laws. As the Fund states on its website, "The Haas, Jr. Fund is developing this series because we believe in the power of listening and the importance of seeing the world through others' eyes."

At the Zellerbach Family Foundation, all of their legal services grants include an outreach and communications component. They recognize that there is work to be done to ensure that people who are immigrants know their legal rights. In addition, it is critical that people at the social service agencies who may serve people who have immigrated have accurate information about the options and rights of the people they serve. These are communications objectives that help advance their immigration program goals.

Convening Grantees and Funders

Foundations have the resources and, therefore, the leverage that few grantees possess to convene nonprofits and funders around mutually relevant communication efforts. When foundations invite grantees and potential grantees to the table with the promise of investing in joint communications projects, people accept that invitation. Most foundations also have access to and relationships with other funders to invite them to participate in joint projects to share learning and possibly even to fund collaboratively.

Working collaboratively, while time- and resource-intensive, is seen as a critical way to leverage resources for greater results beyond what can be achieved solely through grantmaking to individual grantees.

"Anyone that knows smart communication knows that when you have a cacophony of messages, you're less effective; you just confuse the audience. You have to learn together, so the collaboration piece is really important. It's tricky, not everyone agrees, and it takes work over time."

— Alfred Ironside
Ford Foundation

Some of the ways funders can communicate strategically and leverage their resources and influence include:

- Share learning across a movement, including grantees, other nonprofits, and funders via conference calls, webinars, and convenings.
- Attract other funders to an issue or need through affinity groups, funding collaboratives, and the like.
- Invest in message research and testing that can be shared with a coalition of grantees and funders.
- Provide communications, message, and media training to a group of grantees for greatest efficiency and value.
- Share collateral, content, and communications tools across grantees.
- Invest in an individual to act as a scribe and storyteller, focused on gathering and reporting stories that best illustrate the foundation's theory of change at work.

"We know that we're dealing with deep, intractable problems, and that we gain strength by bringing other funders to the table. We're all tackling the same problems from different angles, so the more we can share learning among funders and grantees, the more impact we can have on the issues that motivate our work."

— Denis Chicola
Evelyn and Walter Haas, Jr. Fund

EXAMPLES:

As part of its cornerstone movement-building strategy known as the Equal Voice for American Families Campaign, the Marguerite Casey Foundation hired a former Seattle Post-Intelligencer reporter to become a full-time journalist in residence. Her primary assignment: collect and report feature style stories that shed light on the lives of families living in poverty in the United States. These reports include interviews with policy-makers, legislators, and executives as well as low-income families and the community based organizations who serve them. Stories are published and syndicated in a variety of websites and publications ranging from Casey's very own online newspaper, Equal Voice News, to national news outlets like Democracy Now.

California Civic Participation Funders is a collaborative of ten social justice funders, including the Evelyn and Walter Haas, Jr. Fund. The collaborative is working to increase civic participation in communities of color and among low-income populations in selected counties in California. In [Bolder Together](#), a recent case study published by the participating funders, they explain how their work strives to answer the question: "How can foundations help build movements for opportunity and social change—and win?"

Leverage Your Power Wisely

Foundations increasingly recognize that strategic communication interventions in the service of program goals are not only acceptable, but also necessary. A foundation's portfolio can advance an issue in the form of grants. But foundations also possess three communication assets they can deploy to advance their program goals:

- **Access.** In our culture and society, money talks. Foundations have resources to deploy and people are eager to help them do so. Rather than shying away from this power, foundations can use it strategically and wisely to convene grantees, attract other funders, and influence policy makers.
- **Learning.** Foundations are in a unique position to innovate and test, and to collect data and commission research and evaluation to learn what works. All that knowledge and learning is underutilized if it isn't strategically communicated with the field.
- **Credibility.** Foundations who employ best practices in grantmaking and partner well with others develop powerful credibility in their fields—credibility that can be used to back up the work of grantees.

“People at foundations have always talked to legislators behind the scenes or been in a position to exert influence. This is part of the struggle—how out front are foundations willing to be?”

— Diane Camper
Public Welfare Foundation

Foundations have more credibility and influence than they often think they do when it comes to educating the interested public and advocating with policy makers. While there are restrictions on lobbying, foundations have a fairly wide degree of latitude when it comes to informing audiences on the issue areas where they have credibility.

The key questions for institutional communications to bear in mind: Are we adding value to the movement? And are we making optimal use of our communication assets of access, learning, and credibility?

Ways to leverage communication assets include:

- Publish research and learning to show results, what works, and lessons learned.
- Have a point of view and publish content on the issues on the foundation's website and through the foundation's other channels.
- Participate in social media conversations about the issues, posting original content and reposting and commenting on others' content.
- Participate in conferences, roundtables, and other gatherings of movement leaders and policy makers.
- Write opinion pieces for newspapers, magazines, and blogs.
- Cultivate speaking opportunities for foundation leadership.

EXAMPLES:

Ayesha Saran of the Barrow Cadbury Trust relates, “There was proposed legislation about migrant domestic workers and, along with the Trust for London and the Bromley Trust, we wrote a joint letter to the Times and to the minister, saying the changes would lead to injustice. The law wasn’t stopped in this case, but it is an example of us speaking out. So we do that if we think the issue is sufficiently important and that having our name on it would make a difference and add value in addition to what the grantees are doing.”

Focused largely on the documentary film industry, The Fledgling Fund regularly directs its resources to films which have enormous potential for social impact. One such example is the film “The Invisible War,” an Oscar and Emmy nominated exposé on rape in the United States military. Secretary of Defense Leon Panetta saw a screening of the film three days before its Sundance premier, and soon after issued new, stricter guidelines for how the military investigates allegations of sexual abuse within its ranks. “We fund social change. Our bottom line is not film for film’s sake; the medium is a means to an end,” said Emily Verellen, Fledgling’s director of programs and communications. “The Secretary Panetta example reveals the unique power of how strong storytelling, plus an effective and targeted action campaign, can change lives for the better.”

PART 2: Brand, Message, and Audience

The leaders we spoke to emphasized the importance of being clear about what you stand for as a foundation, what you want to say, and who you say it to. Or, in the parlance of the marketing-communications field: brand, message, and audience.

Brand: Being Clear

Every organization has a brand. Unbound Philanthropy is no exception.

Whether you cultivate and manage your brand actively, or let it evolve organically over time, that brand still exists. Your grantees will draw conclusions based on the tenor of their interactions with you. Peer organizations will partner with you depending on their perceptions of how consistently and clearly you act. Your staff will be motivated to align with the brand provided that it resonates with their own values. The strongest brands around today are those that capitalize on an organization's strengths and unique attributes, leveraging these qualities authentically through every business decision, large and small.

Great organizations are built on a deep understanding of their own mission and reason for being. This brand awareness is an essential business tool and a strategic lever that enables an organization to have a united vision, to increase awareness, to act with impact, and to consistently advance its work.

As the nonprofit landscape grows more crowded, and issues like immigration gain increased visibility and mindshare in the public eye, foundations need strong brands to help center their work and hold their focus.

Developing a clear brand helps an organization align internally. It helps you act with consistency, clarity, and purpose. A strong brand also helps all audiences—peers, grantees, opinion leaders, decision makers, potential grantees—to know what they should expect from you. It helps set and manage expectations about grantmaking; it becomes an asset that helps you leverage your grantmaking dollars; and ultimately, it helps ensure your philanthropic legacy.

Ways to leverage brand in service of program goals include:

- Go through a facilitated process to articulate your brand framework, including your organization's promise, positioning, and personality. Just going through the process can be a way to achieve internal clarity that can guide the organization for decades to come.
- Use your brand (in other words, reputation and credibility) to gain access to opinion leaders, funders, and policy makers.
- Develop your brand so that you can effectively amplify and elevate the work of your grantees.

“One of the big drivers for communicating our work is being able to have an ‘in’ with policy-makers. The more well known you are as a brand—if they have a sense that you are respected and trusted, and there’s a clear idea of what you are doing and what you stand for—the more likely they are to want to meet with you.”

— Ayesha Saran
Barrow Cadbury Trust

EXAMPLE:

The Northwest Area Foundation (NWAf) is one of several foundations we interviewed that has been through a formal, facilitated process to clarify and reveal the organization's brand platform. This multi-month process included all members of NWAf's senior leadership team (C-level executives plus cross-functional vice presidents and directors). "We did a formal process to hone and craft a strategy and a brand platform that was authentically our own," said NWAf's Sylvia Burgos-Toftness. "And the management team leaned in and owned the process totally."

Messages: Taking a Stand

Foundations working in social change issues need to decide what they want to say to their audiences, and that means deciding where they stand on the issues on a continuum from neutral to advocacy.

Several of the foundations we spoke to placed themselves toward the advocacy end of the spectrum; others spoke of contributing knowledge and research to the field rather than taking an advocacy stand. All, however, emphasized aligning foundation communications with the values that inform program priorities.

"There is an inherent value to the cross-sector, cross-geography, multi-issue expertise that funders have as a result of where they sit and how much they see. There is a case to be made for putting that expertise to use."

— Diane Camper
Public Welfare Foundation

In fact, foundations that have made, or are making, the transition from living donors to the next generation tell us that focusing on the founders' values—not their personalities—is the way to ensure a lasting legacy. It is also the key to keeping the focus where it belongs: on the work, rather than on individuals and families.

Whatever a foundation's stance, there is general agreement that foundations are well-positioned

to communicate messages that inform and educate. By virtue of making grants to multiple organizations and initiatives over time, foundations build a body of experience, knowledge, and expertise that can be put to use to advance their program goals.

Ways to use messaging to advance program goals includes:

- Invest the time and money required to conduct research and develop messages that resonate. Many of the foundations we spoke with are finally embracing market research tactics long thought to belong solely to the for-profit consumer world. They are increasingly learning that social science can be used for social good.
- Create a message platform that describes the foundation's work and that of their grantees in terms of results and value (rather than grants and transactions).
- Think of messages less as a series of talking points and more as a framework within which you can elevate grantee stories and the voices of experience.

EXAMPLE:

The Evelyn and Walter Haas, Jr. Fund has commissioned message research in several areas related to its gay and lesbian rights portfolio. Among the research topics: what messages can help build support for the Fair, Accurate, Inclusive and Respectful (FAIR) Education Act in California; and how to talk about marriage equality in faith communities. Working with a coalition of grantees in an effort known as the Breakthrough Conversations, the Fund is sharing its research and training volunteers in how to use the messaging to advance the cause of gay and lesbian rights.

Audience: Keep your Focus

Foundation communications are less likely to be successful when aimed at a broad, “general public” audience. Few foundations have the resources to influence public opinion single handedly, and few foundation desire the profile it would take to do so. Rather, it pays to focus communications tightly to audiences that matter. Speak directly to those with influence on your issues, and participate in the conversation where it is taking place among other funders, advocates, communities, and policy makers.

The priority audiences mentioned most frequently in our interviews were grantees, policy makers, other funders, and opinion leaders or influential people.

Grantees may be the most powerful and important constituency for foundations to focus on. They are typically the “arms and legs” of most effective social change movements. As such, foundations are wise to invest in equipping them with the tools required to communicate effectively.

Policy makers are another key audience for foundations. Policy makes respect the credibility (and, frankly, the resources) of foundations, which gives them a level of credibility and access many grantee organizations may never have. As 501(c)(3) organizations, foundations have restrictions on lobbying activities. Yet grantmaking organizations can do more than many seem to think in terms of informing, educating, and even advocating on issues.

Increasingly foundations are recognizing their peers as a key audience, for a variety of reasons, including sharing knowledge and lessons learned, and attracting new funders to issues.

Ways to focus on and engage your audiences:

- Map your stakeholders and audiences and prioritize them in order to get as specific and efficient as possible with your communications. Challenge yourself whenever your audiences are not defined narrowly enough. When it comes to targeting your communications, “policy makers” is good; but “city council members representing districts north of downtown” is better. Speaking to “funders” is a start, but speaking to “funders with a grant making budget of \$5 to 25 million who prioritize poverty” may be far more useful.
- Look for ways to listen to your audiences and gather input and feedback. The Center for Effective Philanthropy’s Grantee Perception Report is an industry standard, though there are now multiple options for measuring and benchmarking grantee opinions and perceptions of your work.
- Track your website and email marketing metrics to better understand who is opening, reading, and downloading your content, and adjust your targeting and messaging accordingly.

PART 3: Communication Challenges

Creating social change is long, hard work, and no foundation we spoke with—not even the larger ones with communications departments—has perfected the craft of communications or figured out how to solve every problem. Throughout our interviews, there was surprising consistency among respondents when it came to identifying challenges and barriers to success.

The Tension Between Aspiration and Reality

Foundation founders, trustees, and executive leadership are committed to philanthropy because they want to contribute to a better world. They want to use their time, talent, and treasure to make a difference.

In many cases foundations aspire to a greater level of courage, risk-taking, and leadership than they currently know how to demonstrate. Foundations may think they are leading the charge, pushing the boundaries of progressive advocacy more than they really are. In truth, caution, risk aversion, fear of failure and concerns about privacy are powerful disincentives that foundations must balance with their aspirations for leadership and social change.

Advice we heard on managing this tension included:

- Connect your communication to values and strategy. When a foundation communicates strategically from a place of core values, the risks are worth taking, and the rewards—measured by results toward program and policy goals—are almost always greater.
- Ask your grantees and partners how the foundation can best serve the movement and exhibit leadership, and listen carefully to what they have to say. The Center for Effective Philanthropy’s Grantee Perception Report, or other evaluation tools, can be helpful vehicles for gathering information and benchmarking your foundation against hundreds of other funders, since these reports include questions about the foundation’s impact on the field and on public policy, among other metrics.
- Lead with values, not with personalities or foundation self-promotion. In addition to being more authentic and effective, this approach can also mitigate concerns about privacy and risk.
- Accept that a certain loss of control is inevitable—and normal. Many foundations are reluctant to communicate via social media because they are afraid of not being able to control the terms or duration of a public conversation. But the web is largely self-correcting, and the good will that can be gained from communicating in a trustful and open way typically outweighs the threats and risks.

Concerns About Repercussions

Foundations have long been concerned about the potential repercussions of taking a stand and communicating publicly about their work. Repercussions can include criticism, negative attention, and becoming the target of opposing viewpoints.

Most of the funders we spoke to said that these repercussions have not materialized, even as

“We use the term ‘interested public’ and with them in mind we believe it is very important to be transparent. There is no ‘general public’ audience for us per se, but there are folks who watch us closely. We try to be as clear and direct in how we communicate as possible.”

—Gail Fuller
Rockefeller Brothers Fund

their foundations have moved toward greater transparency and strategic communications. A few of the larger funders we spoke with said that they have experienced low to moderate criticism or publicity. Several said that whether they have experienced negative attention or might in the future, they are not particularly concerned about it. After all, negative publicity doesn't cause a private foundation to lose its revenue the way negative publicity might affect a business's customers or a nonprofit's donors. Responding effectively to criticism can help strengthen a foundation's reputation and credibility. An organization's brand becomes stronger when people know what you stand for.

Irene Schneeweis at the Ms. Foundation for Women, speaking of their work on child sexual abuse and other issues affecting women and girls, went so far as to say that negative attention would be a sign that they're doing something right: "We haven't experienced backlash, but we're not afraid. We want to be in a position where people care enough about what we think to have some blow back. We want to be clear about what we stand for."

Funders pointed out that there is strength in numbers. Gail Fuller of the Rockefeller Brothers Fund said, "I would love to see more foundations work together as a team when we get negative backlash. We could do a much better job of coordinating our message and strategy in how we respond. Too often we fail to be integrated in the same ways we advise our grantees to be."

Advice for managing negative attention includes:

- Accurately assess the risk from criticism and avoid overreacting. While it never feels good to receive negative attention, keep in mind the power you have to contribute to the debate in a positive way, and be realistic about the usually negligible impact that voices on the fringe of an issue have.
- Anticipate objections and criticism and be prepared with data, stories, and messages to deflect and reframe the issue in a positive way.
- Collaborate with others in the movement to present a united front in the face of opposition.
- Practice transparency. Transparency makes foundations less of a target to criticism from political opposition or regulatory changes.

Define The Frame, Control The Game

Several interview participants pointed out that conservative philanthropy has been more effective on public policy issues than progressive philanthropy. Think tanks have worked for decades to establish frames and messages that shape public discourse and public opinion. As Susan King, formerly of the Carnegie Corporation, pointed out, "The Koch brothers are some of the most effective philanthropists in the country. They have an agenda, they want to change things, they take a stance, and they get it done."

Lina Avidan at the Zellerbach Family Foundation shared this observation, "A lot of conservative think tanks have been phenomenally successful, whereas progressives can be really disjointed, unwilling to come right out and say what they're trying to accomplish." As an exception to this, she raised the example of healthcare policy in California, where philanthropies working on healthcare access, quality, and equity were able to make significant policy progress by working together in concerted and focused way over a long period of time.

Lessons learned for philanthropy focused on social justice include:

- Transparency is incredibly important for social justice movements. Take a stand, be clear and transparent about what you're trying to do, and focus on ways to get results.
- Humility and modesty can sometimes get in the way of taking a stand and focusing on results. Balance these values with the values of justice and opportunity for all people.
- Collaborate to pool and leverage resources, build a strong movement, and do more together than individual foundations or grantees can do alone.

Appendix A: List of Interviews

We are grateful for the participation of the following foundation leaders who spoke with us to inform this report:

Alfred Ironside, Ford Foundation

Andrew Solomon, John D. and Catherine T. MacArthur Foundation

Ayesha Saran, Barrow Cadbury Trust

Denis Chicola, Evelyn and Walter Haas, Jr. Fund

Diane Camper, Public Welfare Foundation

Emily Verellen, The Fledgling Fund

Gail Fuller, Rockefeller Brothers Fund

Irene Schneeweis, Ms. Foundation for Women

John Slocum, John D. and Catherine T. MacArthur Foundation

Lina Avidan, Zellerbach Family Foundation

Mubin Haq, Trust for London

Robert Bray, Public Interest Projects & Four Freedoms Fund

Susan King, formerly of the Carnegie Corporation of New York

Sylvia Burgos Toftness, Northwest Area Foundation

Sylvia Yee, Evelyn and Walter Haas, Jr. Fund

Appendix B: Foundation Profiles

	Type	Total Assets	Total Giving	Fiscal Year	Funding Areas
Barrow Cadbury Trust	Charitable company limited by guarantee	£77,710,000	£4,165,000	3/31/10	Criminal Justice Migration and Europe Poverty and Inclusion
Carnegie Corporation of New York	Independent foundation	\$2,548,230,211	\$119,805,090	9/30/11	International Peace and Security Islam Initiative Higher Education and Libraries Democracies and Civic Integration
The Fledgling Fund	Independent foundation	\$18,446,847	\$2,126,605	12/31/09	Economic Justice and Systemic Poverty Environmental Justice Field Building Girls' Empowerment and Women's Leadership Health and Wellness Justice System
Ford Foundation	Independent foundation	\$10,498,932,621	\$427,625,656	9/30/11	Democratic and Accountable Government Economic Fairness Educational Opportunity Freedom of Expression Human Rights Metropolitan Opportunity Sexuality and Reproductive Health and Rights Sustainable Development
Evelyn and Walter Haas, Jr. Fund	Independent foundation	\$484,856,814	\$25,151,215	12/31/10	Immigrant Rights Gay and Lesbian Rights Education Opportunities Nonprofit Leadership
The John D. and Catherine T. MacArthur Foundation	Independent foundation	\$5,737,270,334	\$220,667,589	12/31/10	International Programs U.S. Programs Media, Culture, and Special Initiatives MacArthur Fellows
Ms. Foundation for Women	Public charity	\$42,702,948	\$3,486,586	6/30/11	Building Democracy Economic Justice Ending Violence Women's Health

Sources: Foundation Center; annual reports; foundation websites

	Type	Total Assets	Total Giving	Fiscal Year	Funding Areas
Northwest Area Foundation	Independent foundation	\$426,444,303	\$22,668,144	12/31/10	Assets and Wealth Capacity and Leadership Public Policy
Public Welfare Foundation, Inc.	Independent foundation	\$450,320,490	\$22,051,678	10/31/11	Criminal Justice Juvenile Justice Workers' Rights
Rockefeller Brothers Fund, Inc.	Independent foundation	\$789,378,035	\$28,004,330	12/31/10	Democratic Practice Peacebuilding Sustainable Development Pivotal Places
Trust for London	Independent foundation	£207,000,000	£6,500,000	2011	Employment Migration Social Justice Strengthening the Sector
Unbound Philanthropy	Independent foundation, family foundation	\$115,090,018	\$4,653,980	12/31/10	Immigration and Migration
The Zellerbach Family Foundation	Independent foundation, family foundation	\$118,568,784	\$4,566,446	12/31/11	Arts Improving Human Services Systems Immigrants and Refugees Strengthening Communities

Sources: Foundation Center; annual reports; foundation websites

Appendix C: Channels and Transparency

The following items are communications channels used by various foundations to provide transparency about their work. Sources: Foundation Center databases; foundation websites and social media channels.

	Unbound Philanthropy	Barrow Cadbury Trust	Carnegie Corporation of New York	The Fledgling Fund	Ford Foundation	Evelyn and Walter Haas, Jr. Fund	John D. and Catherine T. MacArthur Foundation	Ms. Foundation	Northwest Area Fund	Public Welfare Foundation	Rockefeller Brothers Fund	Trust for London	Zellerbach Family Foundation
Blog				■				■			■		
Board profiles on website		■	■		■	■		■	■	■	■	■	
E-newsletter	■	■	■	■	■	■	■	■	■	■	■	■	
Facebook account			■	■	■	■	■	■	■	■	■		
Giving Pledge		NA	NA	NA	NA	NA	NA	NA	NA	NA	■	NA	
Grantee perception report on website						■					■		
Grants database on website			■		■	■	■			■	■	■	
Financials		■	■		■	■	■	■	■	■	■	■	■
Knowledge center		■	■		■	■	■	■	■			■	
Philanthropy's Promise					■	■		■	■	■			
Podcast			■										
Staff profiles on website	■	■	■	■	■	■	■	■	■	■	■	■	
Twitter account			■	■	■	■	■	■	■	■	■		
YouTube channel				■	■	■	■	■					

About Brotherton Strategies

Brotherton Strategies is a Seattle-based consulting firm that provides strategic communications services to a diverse mix of private and public grantmaking foundations, nonprofits, NGOs and other mission-driven businesses. Founded in 2004, Brotherton Strategies provides brand strategy, media relations, message development, evaluation services and more in order to help its clients advance positive social and environmental change. For more information, visit www.brothertonstrategies.com.