



# Foundation Communications

## A Survey of Current Practice

### Executive Summary

---

In February 2006 Brotherton Strategies was retained by the Evelyn & Walter Haas, Jr. Fund and The James Irvine Foundation to conduct a survey of communication practices among a number of similar grantmaking foundations. This research project was envisioned as a way to inform the emerging communication strategies taking shape at Haas and Irvine.

Telephone interviews were conducted between February 20 and March 29, 2006 with senior-level communication representatives from eleven national grantmaking foundations:

- Annie E. Casey Foundation
- The California Wellness Foundation
- Ford Foundation
- Foundation for Child Development
- The William and Flora Hewlett Foundation
- John S. and James L. Knight Foundation
- Lumina Foundation for Education
- Charles Stewart Mott Foundation
- David and Lucile Packard Foundation
- Robert Wood Johnson Foundation
- The Wallace Foundation

The results of this survey are neither absolute nor definitive. They are not a quantitative summary of facts, but rather a compilation of unique observations and “learnable lessons” across a narrow set of categories. The survey is not intended as a 360-degree evaluation or comprehensive report on the ‘state of communications practice’ across the philanthropic sector as a whole. Conclusions drawn reflect the subjective “point-in-time” opinions of the interviewers alone based on their awareness of the issues and questions most important to the project funders and the field at large.

Key findings from the research were as follows:

- **Most of the foundations interviewed share several important characteristics that give strength to their communication programs.** These qualities include the willingness to experiment or test a broad mix of communication strategies; organizational flexibility sufficient for adapting to changing conditions, circumstances and grantee needs; a commitment to continuous self-evaluation and improvement; strong alignment between program decisions and organizational mission; and an ability to listen and respond to the needs of other key stakeholders.

- **A foundation's brand, identity and voice tend to be organically derived from a combination of factors**, including founder intent; organizational mission; executive/trustee vision and style; and the tone, tenor and volume of public discourse within key program priorities.
- **There are numerous impediments to effective external communications.** Foundations routinely struggle to articulate their diverse and multifaceted program objectives with precision, consistency and impact in an environment where philanthropy itself is not widely understood. Others wrestle with the mundane resource challenges of maintaining the tools, lists and production schedules required to keep stakeholders adequately informed.
- **There is a trend toward deeper integration of programs and communication activities.** Nine of the 11 foundations surveyed have either combined programmatic and communication responsibilities into a single senior management role, or have a senior-level communication staff person who engages routinely with the executive team, the president, and/or the board of directors. If programs and communications are structurally distinct functions, it is critical for the communications staff to regularly work with the program team.
- **Too many foundations fail to set aside enough time for planning.** This challenge is particularly acute among communicators, who feel they are constantly responding to the urgent needs of grantees, the media, and various other audiences.
- **A demonstrated commitment to transparency should be a critical component of every foundation's work.** And nowhere is this more critical than in the areas of asset and expenditure reporting. Most grantmakers are willing to accept certain levels of risk, provided the program decisions being made are linked directly to the organization's mission.
- **Evaluating foundation communications is very difficult.** Oftentimes, outputs act as proxy measures for outcomes. Qualitative measures of success that closely relate to the foundation's mission are routinely recognized and valued by trustees.
- **Technical assistance is easier said than done.** Much has been discussed about the importance of communication-focused technical assistance programs, yet barely half of the foundations interviewed are currently providing this type of support for the organizations they fund.
- **Foundations are increasing their investments in message development, framing and public opinion research.** New media strategies (including blogs, podcasts, RSS feeds and other emerging technologies) are also attracting significant interest from funders as communicators work to keep pace with the information age.
- **Budgets vary widely from organization to organization.** The annual communication budgets of the 11 foundations surveyed ranged from \$335,000 on the low end to nearly \$50 million on the upper extreme. Many funders are finding creative ways to leverage sizeable program dollars to advance key communication objectives.