

Communication Basics for Foundations

ANNUAL CONFERENCE
SEPTEMBER 27, 2016



**THE MILES
FOUNDATION**
Investments in Education

The 
Crimsonbridge
Foundation

**exponent
philanthropy**
to the power of small



PRESENTERS

Sara J. Redington

Director of Communications
The Miles Foundation

Danielle M. Reyes

Executive Director
The Crimsonbridge Foundation

Purpose & Objectives



Declaring Personal Goals

What do you want to get out of this session?

Agenda

① **A** LIGN GOALS

with the foundation's mission and vision

② **C** LARIFY AUDIENCES

the foundation seeks to engage

③ **T** ARGET CHANNELS

to connect with key stakeholders

ADDENDUM: Tools & Templates

SESSION EXPECTATIONS

- ✓ **DIAL** in
- ✓ **RESPECT** confidentiality
- ✓ **SHARE** your experiences
- ✓ **STEP** outside your comfort zone

NAVIGATING POTENTIAL ROADBLOCKS

related to starting a strategic communications plan

De-Bunking Communications Myths

POTENTIAL ROADBLOCKS	POSSIBLE SOLUTIONS
1) No communications expertise on staff	<ul style="list-style-type: none">• Recruit communications experts for your board or advisory council.• Hire a consultant per project or by the hour.• Use free online tools, attend a training or the ComNet conference.
2) Limited or no current budget	<ul style="list-style-type: none">• Begin by phasing in funding on a project by project basis, quarterly, add this line item to the budget.• Start with no cost options such as social media platforms, requesting photography from grantees, etc.• Engage volunteers, board members, or pro bono consultants.
3) Resistance from executive/board leadership	<ul style="list-style-type: none">• Show comparative examples from like foundations.• Focus on low hanging fruit first and keep emphasis on easier projects to build support.• Demonstrate that there will be a return on investment (efficiencies for staff, brand clarity with community, more visits to webpage, new partnerships, increase in media visibility, etc.) and use Google Analytics to measure.
4) No time	<ul style="list-style-type: none">• Start small and have fun. Curate from existing content instead of creating new, collaborate with partners on materials. Plan to do one website update per month, one blog post per quarter, or one tweet per week.• Set reasonable goals. What gets measured gets done.• Look for ways to integrate communications activities into your existing program work and activities (e.g., add communications requirements and guidelines to your grant agreement, take photos during site visits, etc.)• Delegate and use all of your staff talent.• Engage volunteers, board members, or pro bono consultants.

① ALIGN GOALS

with the foundation's mission and vision

Mission

What is your foundation's purpose?

vs.

Vision

What will be your foundation's legacy?

Understanding Your Mission

What was/is your founder's intention for the foundation?

Do you have a mission statement? If so, what is it?

Don't have a mission statement, or have questions about your mission? Make a note of those areas where you would like to gather more information:

① ALIGN GOALS

with the foundation's mission and vision

Connecting Goals with Mission & Vision

COMMUNICATIONS

TODAY

TOMORROW

**WHO WE
COMMUNICATE
WITH**

-
-
-
-



-
-
-
-

**WHAT WE TALK
ABOUT**

-
-
-
-



-
-
-
-

**HOW WE
DISSEMINATE OUR
MESSAGE**

-
-
-
-



-
-
-
-

COMMUNICATIONS GOALS

GOAL

(What we want to achieve)

-
-
-
-
-
-

ALIGNMENT

(How it connects to our mission/vision)

-
-
-
-
-
-

① ALIGN GOALS

with the foundation's mission and vision

Case Study



BREAKOUT DISCUSSION: GETTING STARTED...

WHAT YOU CAN DO TODAY

WHAT YOU CAN DELEGATE

WHERE YOU NEED HELP

② CLARIFY AUDIENCES

the foundation seeks to engage

Identifying Key Stakeholders

KEY STAKEHOLDERS ARE:

- People/organizations that can help us further our mission by strategically connecting us to partners, resources, and/or funding opportunities.
- People/organizations that can elevate our brand based on their reputation or influence.
- People/organizations that align with our mission, beliefs, and overall vision.

TIP: Consider a diverse array of sectors when searching for key stakeholders, including Government, Business, Academic, Faith, Media, Philanthropy, and Nonprofit. Also explore enlisting experts in the fields that are focus areas of your giving.

Priority

Organization / Individual

Priority

Organization / Individual

② CLARIFY AUDIENCES

the foundation seeks to engage

Connecting with Your Target Audience

CARES & CONCERNS

Audience:

CARES & CONCERNS

Audience:

Audience:

CARES & CONCERNS

② CLARIFY AUDIENCES

the foundation seeks to engage

Case Study

CRIMSONBRIDGE FOUNDATION

- Foundations and Individual Donors
 - Nonprofits
- The Archdiocese and Catholic Orgs
 - Education Institutions
- Industry / Membership Groups
 - Media

THE MILES FOUNDATION

- Industry / Membership Groups
 - Local Businesses
 - Nonprofits
 - Media
- Government / Legislative Officials
 - Local Education Institutions
 - Foundations

BREAKOUT DISCUSSION: GETTING STARTED...

WHAT YOU CAN DO TODAY

Empty box for notes under 'WHAT YOU CAN DO TODAY'

WHAT YOU CAN DELEGATE

Empty box for notes under 'WHAT YOU CAN DELEGATE'

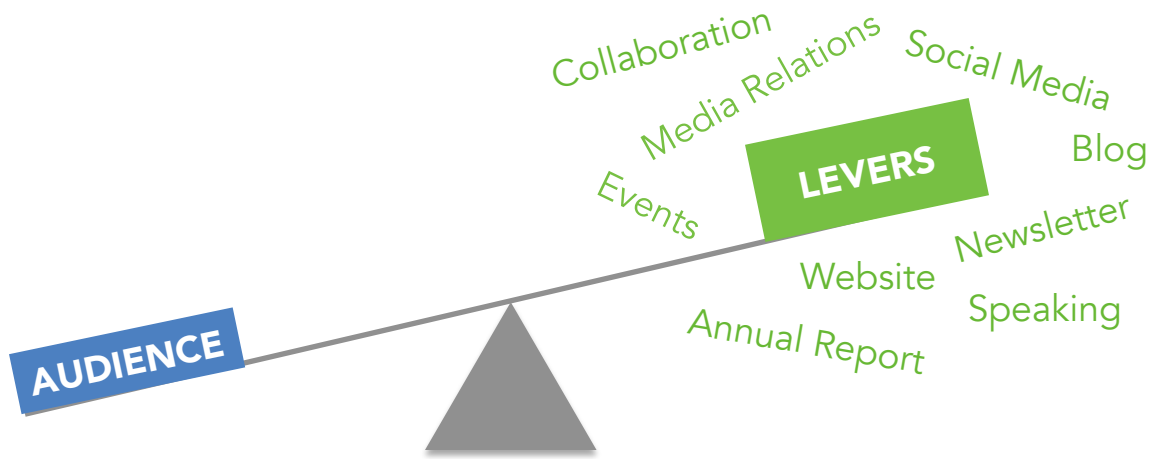
WHERE YOU NEED HELP

Empty box for notes under 'WHERE YOU NEED HELP'

③ TARGET CHANNELS

to connect with key stakeholders

Identifying Communications Levers



AUDIENCE(S)

LEVER

③ TARGET CHANNELS

to connect with key stakeholders

Crafting Your Message

WHY?

Why is this issue important?

WHY NOW?

Why is it a priority today?

WHY US?

What is our unique perspective?

③ TARGET CHANNELS

to connect with key stakeholders

Case Study

CRIMSONBRIDGE FOUNDATION

- ✓ Website
- ✓ External Speaking/Writing
- ✓ Press Releases
- ✓ Social Media (Twitter)
- ✓ Partners and Grantees

THE MILES FOUNDATION

- ✓ Quarterly Newsletter
- ✓ Blog
- ✓ Social Media (Twitter, LinkedIn)
- ✓ PR
- ✓ Website
- ✓ Annual Report
- ✓ External Speaking/Writing

BREAKOUT DISCUSSION: GETTING STARTED...

WHAT YOU CAN DO TODAY

Empty box for notes under 'WHAT YOU CAN DO TODAY'

WHAT YOU CAN DELEGATE

Empty box for notes under 'WHAT YOU CAN DELEGATE'

WHERE YOU NEED HELP

Empty box for notes under 'WHERE YOU NEED HELP'

Tips and Resources for Effective Communications Execution

You Have Your Audience, Levers, and Message...Now What?

- ✓ Assign **SUCCESS METRICS** to each lever and track them
- ✓ Create a communications **CALENDAR** to stay on track
- ✓ Conduct an **ANNUAL REVIEW** and revise as needed
- ✓ Dedicate or hire **RESOURCES** needed to execute
- ✓ Remember communications is all about **RELATIONSHIPS**









NOTES:

Addendum

TOOLS & TEMPLATES

ADDENDUM: Tools & Templates

Social Media Tip Sheet*

CHANNEL:	USERS:	MOST USEFUL FOR:	PRO TIPS:
	Everyone (just about.) Studies show that 93 percent of all adult users online are on Facebook.	Casual two way conversation, conversation sparking and increasingly to disseminate news.	<ul style="list-style-type: none"> • Use photos, keep to < 250 characters • Question posts get 100% more comments than standard text-based • Using emoticons can get your post liked 57% more than those without
	190 million unique site visitors monthly with nearly 650 million registered users and 58 million tweets per day.	To continue a conversation, to deliver relevant and urgent information or for tailored customer service (less so for philanthropy).	<ul style="list-style-type: none"> • Listen and observe how others you admire interact on Twitter before diving in. Use search.twitter.com to find and monitor conversations • Using hashtags gains 2x more engagement • 86% of tweets with links get shared • Tweet 2-5 times daily, later in the day tweeting gets more traction (during commuting times)
	More than 300 million members and 3 million company pages	Establishing connections, industry insights and idea exchange	<ul style="list-style-type: none"> • Use relevant keywords in content • Best times to share content: 7-8:30am, 5-6pm Tues-Thurs
	200 million active users who share 60 million images per day.	Sharing photo and video images – best utilized for food, fashion, luxury or lifestyle industries and less utilized for philanthropic sector	<ul style="list-style-type: none"> • The human brain can process images 60,000 times faster than text! How are you leveraging this in your message sharing?
	300 million active users per month	Utilize similarly to Facebook, but will help your discoverability more (as it connects in with Google's search engine optimization)	<ul style="list-style-type: none"> • Use hashtags, ideally 2-3 per post • Best times to post are 9-11am
	70 million users	Targeting women specifically, as they make up 80 percent of all users. Also, Pinterest users spend nearly double what Facebook users spend and triple what Twitter users spend.	<ul style="list-style-type: none"> • Keywords in descriptors are essential • Make sure to attribute images if they aren't your own! • Best times to pin are on Saturdays, 2-4pm and 8-11 pm
	More than 1 billion unique users visiting monthly, with 80 percent of traffic from outside the US	Reaching adults ages 18-34 (According to Nielsen, YouTube does it better than any cable network)	<ul style="list-style-type: none"> • Create content on a frequent basis, and aim to grab viewer's attention within the first 15 seconds of your video
	40 million registered users	Best for 18-20 year old demographic and for more "fun" engagement	<ul style="list-style-type: none"> • Invest in a tripod • Be creative with this platform! • Users most active from 10-11am on weekends

*Page content source: SMM 101: Which Social Media Platform Should I Use?, Albert Costill, Search Engine Journal, www.searchenginejournal.com, 2014

ADDENDUM: Tools & Templates

Traditional Media Tip Sheet*

BUILDING A MEDIA STRATEGY

- ① **Identify a Purpose (“The Why”):** Every media strategy should be rooted in a specific message and sense of purpose.
- ② **Tell a Story:** It’s often easier for people to remember stories than it is for them to remember facts.
- ③ **Do Your Research:** Before you launch any major campaign, know your facts.
- ④ **Develop Relationships:** Building meaningful relationships with people in your community is key to the success of any campaign.
- ⑤ **Stay Relevant:** Make sure the images, quotes, and messages you are using align with the audience(s) you want to reach.

EDITORIAL VIABILITY: HOW TO PITCH YOUR STORY AND MAKE NEWS

- ① **Statistics** – *Who is impacted and how do you know?*
- ② **Profile** – *Tell the story of a person, community, or organization that is impacted.*
- ③ **Timeliness** – *Why today?*
- ④ **Expertise** – *Who can provide credible perspective?*
- ⑤ **Star Power** – *Who else is involved?*
- ⑥ **Compelling** – *Some stories just need to be told.*

ADDENDUM: Tools & Templates

Success Metrics

Communications Lever Which vehicle are we employing?	Target Audience(s) Who are we trying to reach?	Frequency How often will it be used?	Success Metrics How will we measure success?
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••
		<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other:	<ul style="list-style-type: none">•••

ADDENDUM: Tools & Templates

Communications Calendar

January	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

February	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

March	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

April	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

May	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

June	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

July	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

August	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

September	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

October	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

November	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

December	
Deliverable	Due
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

ADDENDUM: Tools & Templates

Communications Plan – Annual Review Checklist

1) CALENDAR & DELIVERABLES

Key Questions:

- Did we meet deliverable timelines? If not, what got in the way?
- Was the frequency of our communications appropriate for our target audiences and our resource capacity? Do we want to increase/decrease the use of any given lever next year?
- Are there key events, partnerships, or holidays we should add to the calendar this year?

2) SUCCESS METRICS

Key Questions:

- Did we meet our goals for the various aspects of the communications plan? Why or why not?
- Did we have the right success metrics in place for each of our levers? Should any of them change?
- Stories are powerful. Do we have a handful of anecdotes that exemplify success as a result of our communications efforts?

3) OVERALL STRATEGY

Key Questions:

- Does our communications plan still align with our foundation's mission and vision?
- Which key relationships should remain on the plan? Which should be removed? Added?
- What resources do we need in the coming year to support the communications strategy?

ADDENDUM: Tools & Templates

Additional Resources

Articles and Tools

- Communicating for Impact: Strategies for Grantmakers, GrantCraft
www.grantcraft.org/guides/communicating-for-impact
- Going Public, Essentials, 2013, Issue 1, Exponent Philanthropy
www.exponentphilanthropy.org/forms/store/ProductFormPublic/leadership-in-philanthropy
- Media Toolkit, Exponent Philanthropy
www.exponentphilanthropy.org/docs/default-source/tools-and-resources/media-toolkit.pdf?sfvrsn=2
- Making Ideas Move, *Stanford Social Innovation Review*
ssir.org/articles/entry/making_ideas_move
- Media Impact Assessment, Media Impact Funders
<http://www.mediaimpactproject.org/impact-assessment-and-metrics-guide.html>

Websites and Resources

- Exponent Philanthropy
www.exponentphilanthropy.org/
- Media Impact Funders
mediaimpactfunders.org/
- The Communications Network
www.comnetwork.org/
- Communications Association for Community Foundation Professionals (CommA)
www.commaconnect.org/About/Overview.aspx