



CREATING A
FOURSQUARE
COMMUNICATIONS
PLATFORM

Easy Steps to
Build the
Communications
Capacity of Your
Grantees

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four-square (fôr'skwer') *Adj:* **1.** perfectly square **2.** unyielding; unhesitating; firm **3.** frank; honest; forthright

Adv: **1.** in a square form; squarely **2.** forthrightly

Also:

N: a child's game in which each of four players stands in one of four boxes drawn on the ground in a two-by-two grid and must bounce a ball into another player's box without holding the ball or stepping out of bounds.

N: a location-based social networking game (Twitter meets Yelp)

One of the biggest mistakes nonprofits make when it comes to communications is moving right to tactics. They want to speak frankly and forthrightly to their most important audiences, but instead go for the quick fix—the flashy press conference, the latest new media technique, the glossy brochure—before thinking through the big picture. When tactics come before strategy, these activities often fall flat, burning up precious grant dollars in the process. Communications is not a tactical game. Strategy and practice are critical.

Strong communications is the key to any successful campaign. Investing in building the capacity of your grantees to use communications as effectively as possible can offer big payoffs for both you and your grantees. Nonprofits that are able to align their communications efforts to their overarching strategy are much more likely to reach their social change goals—and much better positioned to support your theory of change in the process.

Spitfire Strategies specializes in building the capacity of foundations and their grantees to plan and implement highly successful communications strategies. Over the past seven years, we have learned a lot about the right way to approach capacity building—and the wrong way. This document offers foundations a few of the lessons we have learned when it comes to offering capacity-building opportunities to grantees.

For funders, there are four key areas to consider when it comes to putting a strong communications capacity-building program in place for your grantees.

1. When it comes to communications, what do your grantees already do well and where do they need help?
2. What approach will work best when it comes to addressing the specific needs of your grantees?
3. How can you make your capacity-building dollars go farther by ensuring grantees not only build their own capacity but fully integrate lessons learned into the overall organization?
4. How do you know your investment is paying off?

STEP ONE: IDENTIFY THE GAPS

Any organization trying to spark social change has to communicate and communicate well. A group needs to not only know its issue, but also needs to know itself. Only then can it plan for and implement effective communications with firmness and conviction. This includes knowing its strengths, but also recognizing its weaknesses.

Regardless of how big or how small an organization is, the elements that make it a communicating organization are the same. When these elements are present, an organization has a much greater chance of using communications strategically to advance its goals. Spitfire has found that these elements fall into four critical areas. To have a foursquare communications platform all of these elements must be present.

To determine whether a grantee is a communicating organization—or identify areas where it needs help—consider the questions on page 3.

Grantee Perspective

“One of the biggest insights we gained from this process is that communications must include strategic planning and goal setting. In the past, we had jumped directly into activities without laying the strategic groundwork necessary to craft good, effective messages.

This insight, in particular, has shaped our entire organizational approach to communications. One of our team members completely revamped her presentation about our organization. The final communications plan we worked on throughout the training program has strengthened our entire work plan for the Alternative Network. The process forced us to think through contingencies and identify new outreach strategies.

As a result, we have built several activities into our implementation plan that will definitely strengthen the whole program. For example, we now recognize the incredible benefit that a group of beta testers could provide, not only in helping to hone our messages, but also in improving the functionality of the final product. The communications plan really is so much more than just communications.”

—*Althea Erickson*
Freelancers Union

SQUARE ONE:

What are they doing?

Does the grantee you are assessing have:

1. Clarity on the organizational objectives that communications needs to support?
2. A clear brand that is consistently reinforced throughout the organization?
3. Prioritized audience targets that are clearly defined and researched?
4. A written communications plan that guides all of the organization's outreach activities and offers strategies to guide future communications work?

SQUARE TWO:

What are they saying?

Can the grantee demonstrate that:

1. Staff from the CEO to the interns can give the organization's elevator speech?
2. It has a carefully crafted set of messages that resonate with priority audience targets, are jargon free and are told through stories when appropriate?
3. There are designated spokespeople trained to deliver messages via clear talking points in a variety of venues—from presentations to media interviews to policy briefings?
4. The designated spokespeople are skilled at using communications best practices like storytelling to ensure their messages get through to the intended audience(s)?

SQUARE THREE:

Who's doing what?

Is there:

1. A specific staff person assigned to oversee all communications activities (even if that person has another role at the organization)?
2. A standing agenda item on communications at staff and board meetings?
3. An internal system that dictates how big announcements are made, who responds to outside inquiries (including media calls), who approves public statements, who approves Web site content, and so forth?
4. A clear understanding among all staff what each person's role and responsibility is when it comes to communications?

SQUARE FOUR:

How are they evolving?

Does the group have:

1. A crisis plan in place, including a system for issuing rapid response communications if and when needed?
2. A map of important relationships the organization has with its priority audience targets and a system for regularly updating this information?
3. A process for regularly updating the organization's main messages and training all board and staff members on new talking points?
4. Clear metrics for measuring the impact of its communications efforts (and is it using those metrics to inform its activities and revise plans when needed)?

If you answered a definitive yes to all of these questions, then give that grantee a thunderous round of applause: it has a foursquare communications platform already in place.

If the answer to any of these questions is no—or there are some you are on the fence about—read on. (Any caveats you may have noted also go in this category.)

If you are having trouble answering some of these questions, here are three potential approaches you can take to assess your grantees' current communications strengths and needs.

Incorporate this assessment into your routine check-ins. Next time you check in with your grantees about their progress, use these questions to learn more about their communications efforts and outcomes. Compare notes with your colleagues and look for trends in needs among multiple organizations.

Ask grantees to complete a communications self-assessment. Post a short survey on your Web site that includes questions about your grantees' current communications activities and skills. Require grantees to complete this assessment as part of the funding or reporting process—or include these questions in the grant application. Use this information to determine where grantees will benefit most from capacity-building assistance.

Invest in an outside audit of your grantees. This process typically involves hiring an outside consultant to interview grantees, review their print and on-line collateral materials, and conduct other research activities to assess

each grantee's strengths and weaknesses when it comes to effective communications. The auditor will then make recommendations about what types of capacity-building support will be most beneficial to your grantees.

You can also use a combination of these approaches (i.e., ask grantees to complete a brief survey and conduct follow-up interviews with a handful of grantees). The key is to identify specific areas where grantees need help and also note trends among multiple grantees that can be addressed through a single capacity-building program.

Grantee Perspective

"Our organization used our communications plan to inform our short-term marketing plan. Specifically, we executed communication activities targeting three primary audiences. The message for each audience was framed to address values and barriers specific to that audience.

By conducting an "audit" of our marketing and operational materials to ensure that they reflect our organization's brand personality, we now have greater consensus and awareness on who we want to be and the importance of consistent messaging. We are continuing to work with all of our messengers—staff, volunteers, contractors, etc.—to create a habit of consistent messaging. We have shared our workbook materials and communications plan and are currently re-working through several of the exercises to gain internal consensus for our message and brand."

—Brenda Anderson
Legacy Village Green House Assisted Living

STEP TWO: GET THEM THE RIGHT KIND OF HELP

Once you identify specific areas in which grantees need to build their internal capacity in order to lead stronger communications programs, it's good to get them help—but better to get them help they can actually use. This includes making sure you are getting help to the right people—the best communications staff person in the business can not help an organization succeed without buy-in from the organization's leadership.

There are a wide range of capacity-building services available. Here are some examples of the types of capacity-building efforts Spitfire has helped foundations execute for their grantees with great success—as well as our thoughts on when each approach works best.

Tailored Training Sessions

What it is:

These are in-person trainings that bring a group of grantees together with top communications professionals to work on specific aspects of communications strategy or implementation. These can be multi-session, multi-day gatherings where grantees sharpen their skills on a range of important communications issues—from planning to messaging to internal communications to storytelling. They can also be designed to focus on one specific issue area (such as communications planning or developing and giving winning presentations). Participants finish the training with new skills and competencies as well as practical strategies and tips they can immediately apply to their current work.

Works best for grantees who:

- Need help developing their understanding of core communications strategies;
- Are embarking on a new initiative or collaborative effort with significant communications requirements; or
- Have a project already underway that they can work on during the session and apply lessons learned in real time.

Insider tips:

- Tailored trainings work best when they are interactive. Make sure trainers engage participants in hands-on activities throughout the session that give them a chance to apply the learning to their own projects.
- Grantees will get the most out of this opportunity if they are able to work on their current projects. Time is a valuable commodity. Participants appreciate it when they are able to devote time spent at a training to their actual work rather than focusing on make-believe case studies.
- Buy-in from leadership is essential. If participants don't have support from their higher-ups they will not succeed in making real change in the organization.
- Focus on involving senior-level staff who are able to implement lessons learned.
- Conducting a participant assessment at the beginning and end of the session will help inform the curriculum and ensure participants are leaving with the primary learning points.

One-on-One Coaching

What it is:

Coaching is typically offered as a follow-up to a tailored training. Participants get access to a bank of consulting hours they can draw down on as they work to apply lessons learned, and coaches help them put what they've learned into practice. Coaching can also be beneficial for individual grantees who have not participated in a training—particularly if a group is struggling with just one or two of the key elements listed in Square One. The counsel is generally provided via telephone conversations, e-mail exchanges and written feedback on various materials.

Works best for grantees who:

- Need help finishing strategies started during a training and turning them into a communications plan;
- Want to hone messages for a specific program or project;
- Are developing materials in-house (such as brochure copy or Web content) and will benefit from an outside opinion;
- Need help sharing lessons learned with the rest of the organization; or
- Are responsible for their organizations' communications activities but are not communications professionals by trade.

Insider tips:

- Coaching is about giving grantees the resources and encouragement they need to do it better themselves—not about doing the work for them. Make sure grantees understand that the purpose of coaching is to build their own capacity. Coaches should not be viewed as hired help.
- Give grantees concrete examples of what coaches can provide and what the support can do. It should be seen as a perk, not another item on their to-do lists.
- Be proactive and clear that you will be checking in on how this time is used so grantees take the investment seriously. When grantees use the time, they appreciate it.

Webinars

What it is:

Webinars are tailored, Web-based trainings that offer grantees a series of short segments (usually 60 to 90 minutes) on a variety of communications topics. Webinars can be a cost-effective way to help grantees share aspects of communications planning and work together to develop plans and address their communications needs without travel time and expense. Spitfire has worked with some foundations to offer a series of one-hour Webinars to their grantees over a 12-month period. For others, we have developed sessions on one or two key topics—often in anticipation of an upcoming event or policy action. Webinars can be used as a stand-alone capacity-building tool—or be combined with a tailored training to help prepare grantees for an upcoming session or provide a refresher on a specific topic following the training.

Works best for grantees who:

- Are scattered throughout the country (or the globe);
- Want to engage multiple staff in the training;
- Have had some training on communications strategy and want to build the tactical skills to support that strategy; or
- Have attended a training and now need help sharing lessons learned with the rest of their organizations.

Insider tips:

- Webinars are interactive and provide participants an opportunity to ask questions. However, it is also helpful to offer access to some coaching time so participants can ask follow-up questions as they work to apply lessons learned.
- Face-to-face learning is still the recommended way to go. If it is feasible to bring participants together to work with trainers directly, Webinars work best as an add-on to this approach.
- Web-based trainings also need to be interactive. Trainers should integrate exercises, opportunities for feedback and points for group discussion throughout the session. Call on people unexpectedly—this makes everyone pay attention!

Toolkits

What it is:

Toolkits are usually a set of Web-based materials that include general information on strategic communications best practices (such as how to craft an effective press release or pitch a reporter), or issue-specific content (such as message tip sheets, interview talking points, and template press releases).

Foundations have asked Spitfire to create toolkits for individual grantees or a set of grantees working in a common issue area that include such resources as:

- Organizational communications—Tips for getting internal communications on track and creating effective printed materials.
- Media relations—Tools to help create a media plan, write effective press releases and media advisories, pitch the media, and ace the interview.
- Editorial strategies—How to write compelling letters to the editor and op-eds and request an editorial board meeting.
- E-Communications—Tips for making a Web site user-friendly, using social networks, creating an online action center, and incorporating a blog into online communications efforts.

Works best for grantees who:

- Already have a communications plan in place and need help filling in the gaps or moving into implementation;
- Are ready to focus their communications efforts and need to get multiple staff—or the entire organization—on the same page;
- Have a communications plan in place but have limited time or staff to implement the plan and need plug and play resources (such as a template press release or fact sheet); or
- Need help incorporating their messages into a variety of outreach activities.

Insider tips:

- Once a toolkit for a grantee is complete, provide staff with an orientation training that includes an overview of what is included, explains how to use each piece of the toolkit, and offers direction regarding who to go to for help when using this resource.
- Toolkits are most helpful for grantees that have little or no in-house communications staff.
- Toolkits should have general tips but also specific examples that show how to use the tools to disseminate the specific messages.
- Toolkits should be reviewed and revised regularly to ensure they contain the latest information and work with the current issue or political context.
- It is important to incentivize grantees to use these resources so they do not end up collecting dust on the shelf.

Grantee Perspective

“The messaging training has changed the way we do business and significantly increased our effectiveness in engaging new target audiences. We have trained other staff, workgroup and leadership members in these techniques and have refined and focused their project activities. Branding for the project has improved and better emphasizes what we do well. Our work with the media is more on target and serves to convey timeliness and urgency of the issues we address in a way that engages the public.”

—Jill Kind

Catholic Social Services of Washtenaw County

STEP THREE: PROTECT YOUR INVESTMENT

Building the capacity of one staff person to communicate better is a step in the right direction. Getting that person to transfer the knowledge back to the organization and integrate lessons learned into the way the group does business is the ultimate goal. Ensuring lessons learned become part of the grantee's overall DNA will also make your support a long-term investment. To increase the chances of the entire organization adopting new practices, create incentives.

Here are some examples Spitfire has seen in action:

- Make sure grantees recognize that by investing in their capacity you are investing in their long-term success. Have them sign a contract saying they will take the opportunity seriously.
- Require a deliverable—such as a communications strategy or report on how they are making changes at the organization—as part of their capacity-building experience.
- Reward grantees who demonstrate they are applying lessons learned—perhaps by making additional funds available or spotlighting their achievements at an upcoming board meeting.
- Offer site visits as part of the capacity-building program so the entire organization has an opportunity to engage with the trainer and participate in the process.
- Provide a mix of capacity-building services. For example, combine tailored trainings with Webinars to assist the training participants in sharing the lessons with their colleagues.
- Train teams of people from the same organization who are in positions that allow them to implement the lessons of the training and support each other in making organizational changes.
- Spread training and skills throughout the organization by focusing skills building on both leaders and influencers in different departments.

Grantee Perspective

“As a result of our communications plan, our organization has made considerable gains with the Department of Corrections (DOC). The plan was specifically targeted towards Corrections audiences at the state and local level to reduce systems barriers. Accomplishments include collaboration protocols with prison line staff, policy shifts towards transitional services secured from prison management, and significant new funding streams from state-level policymakers to support community-based services.

Those new funding streams were hard-won and required nuanced policymaker targeting and messaging; the DOC communicated “you were speaking our language; all of our contractors should read this.” We were also awarded a highly competitive Kaiser Permanente Community Fund matching funds grant from Northwest Health Foundation. One of the highlights was upon receipt of the award - Foundation staff informed us that the compelling portion of the application was the story of one of our community participants, which had been threaded throughout the entire grant to illustrate multiple points.

These outcomes came as a direct result of identifying values and tailoring messages towards a specific audience to move program issues through the complex system. Communications training has taught us to maximize the use of limited resources by isolating who to contact when and how to influence that person in a complex bureaucracy rather than expend countless hours working through each stakeholder in the system.”

—Kathy Brazell Sevos
Volunteers of America

STEP FOUR: CONFIRM THE PAY OFF

Even the best capacity-building program is only worth it if grantees demonstrate results. Predetermined metrics and ongoing evaluation are critical. Use outcomes from Steps One and Two to set a baseline for grantees' current capacity. Then create a system for measuring their progress along the way.

For each training Spitfire conducts, we audit participants at the start of the program and collect written, self-evaluations at the end of each session and at the end of the entire program period. This information tells us what information is sinking in and where we need to do more work with participants. We also collect feedback about how participants will apply lessons learned to their work (and share this information with their supporting funders).

It's also important to continue to check in with your grantees and ensure they are continuing to apply lessons learned to create and build their foursquare communications platform. As a funder, you can use many of the recommendations noted in Step One to continue to monitor grantee performance, including incorporating this information into reporting requirements. Spitfire also recommends conducting periodic check-in calls with grantees to get their feedback on how they are integrating what they learned during the capacity-building process into their work and what the outcomes are. Use these calls to explore barriers that may be preventing grantees from adopting new communications strategies and skills and work together to create an approach for overcoming these challenges.

Grantee Perspective

"The executive training experience required nine days out of my overcrowded schedule. Now, I cannot remember a better use of my time in the last twenty years! I came away from the training excited to "rethink" what our organization is really about, in large measure because I had some accessible new tools at my disposal. We used the Smart Chart to prioritize our audiences and messages, and in the process adopted a realistic work plan for once. We are preparing our speeches differently, and using many of the PowerPoint skills we learned. For the coming year, we have prioritized redoing our Web site and developing collateral materials from our many relevant reports that too often go unread. Perhaps most importantly, the training provided the space to focus on communication. It's like an exercise regime. You might resist it, but once you get into it, you realize how much better it makes every aspect of your life."

—*Marcy Whitebook*

Center for the Study of Child Care Employment

CONCLUSION:

When an organization understands the crucial role of communications, assigns responsibilities well, is confident in its messages, and understands how to measure and evolve its communications efforts, the organization has a strong, foursquare communications platform. This platform is as critical to the long-term stability of an organization as its program or revenue platforms and is its ultimate key to success.

As a foundation, one of the most important things you can do to help your grantees move their social change goals is to ensure they have the skills and resources they need to make their voices heard. When you can provide the help your grantees need—making sure they have a foursquare platform from which to speak clearly—they will spend grant dollars more efficiently and create a bigger impact.

Additional resources for building the communications capacity of your grantees follow. For more information, please contact Spitfire Strategies at 202/293-6200 or check out www.SpitfireStrategies.com to learn about our capacity-building services.

BUILDING BLOCKS: RESOURCES TO SQUARE AWAY YOUR GRANTEES' COMMUNICATIONS

Here are some of Spitfire's recommended organizations, tips and tools developed specifically for nonprofits to amplify the effectiveness of their communications and for foundations to guide them in those efforts.

From the strategic minds that brought you this report:

Smart Chart: The Spitfire Strategies Smart Chart for Strategic Communications™ is a tool that helps organizations understand the communications planning process and improves their ability to create or review communications efforts. www.smartchart.org

The Activation Point: If knowledge alone was enough to inspire action, the world would already be a better place. Real change requires action, and the key to moving people from knowledge to action is persuasion. The Activation Point™ offers best practices for planning for persuasion, tailored to the unique needs of social change organizations. www.activationpoint.org

Organizations to call on:

Grantmakers for Effective Organizations (GEO): Grantmakers exist in large part to help nonprofits run their organizations and guide them in developing strategies to increase their impact. But who can these grantmakers turn to for the same support? Explore the resources offered by GEO, a coalition of over 300 foundations and grantmaking organizations working together to advance approaches and practices that boost grantee success. www.geofunders.org

Additional reading material for foundations and nonprofits:

Are We There Yet? A Communications Evaluation Guide: Track the impact of your communications strategies with this evaluation tool by Asibey Consulting and The Communications Network. This free guide gives foundations and nonprofits nine steps to create an evaluation plan that will assess the impact of their communications efforts. It features a step-by-step Evaluation Strategy Worksheet, case studies of organizations that effectively used evaluation methods to reach their goals, and ideas on what to do when you (or your grantees) are not hitting your benchmarks. <http://asibey.com/wp-content/uploads/2008/12/AreWeThereYet.pdf>

Communicating for Impact: Strategies for Grantmakers: To be effective, communications should be integrated into every aspect of a foundation's planning and practices. This guide by GrantCraft, a project of the Ford Foundation, includes tips on helping foundations use communications to create strategies, assess impact, manage relationships and use new media opportunities, to name just a few. http://survey.grantcraft.org/survey/survey2008.php?f=comm_impact.pdf

Foundation Communications: The Grantee Perspective: Based on analyses of thousands of grantee surveys, this issue paper argues for a more holistic approach to foundation communications than is often practiced today. This report highlights best practices and provides practical management implications for foundation leaders. http://www.effectivephilanthropy.org/assets/pdfs/CEP_FoundationCommunications.pdf

Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization: Smart organizations and individuals know that they need to evolve in order to remain effective and relevant in today's dynamic political, cultural and business landscape, but knowing it and doing it are two different challenges. Authors Robert Kegan and Lisa Laskow Lahey recognized that this is much easier said than done. In their reader-friendly new book, the authors offer insights on identifying individual and collective barriers to change and offer effective strategies on how you and your colleagues can conquer them. <http://www.amazon.com/Immunity-Change-Potential-Organization-Leadership/dp/1422117367>

Speaking for Themselves: Advocates' Perspectives on Evaluation: When it comes to assessing the impact of advocacy efforts, find out what your grantees are thinking by going straight to the source. Speaking for Themselves, released by Innovation Network, boils down how nonprofits approach evaluations—what they need to know, the challenges they face and how you can help them successfully analyze and improve their strategies. http://www.innonet.org/client_docs/File/advocacy/speaking_for_themselves_web_basic.pdf

