Communications Network Fall 2009 Conference
Oct. 14 -16, 2009   New York City

Preliminary Agenda

Wednesday, October 14, 2009

4 – 5:30 p.m. **Check-in**
5 – 6 p.m. **Opening reception**
6:15 -6:30 p.m. **Opening remarks -- Board Chair, Executive Director**

6:30 p.m. **Keynote speaker: Frank Rich, journalist and writer**

7:30 p.m. **Dinner on your own**

-or-

8:00 PM **Philanthropy New York Film Screening** -- ***Please Vote For Me***
Following the Frank Rich keynote on Wednesday night, Philanthropy New York is holding a screening at 8 pm in the Ford Foundation auditorium of ***Please Vote for Me**,* and all conference participants are invited to attend. The 50-minute documentary tells the story third graders in a Chinese Primary School that have their first encounter with democracy by holding an election to select a Class Monitor.

Thursday, October 15, 2009

8:30 – 9:30 a.m. **Keynote speaker: Clay Shirky, author**

9:30 – 10:00 a.m. **Break**

Concurrent Breakout Sessions, 10:00 a.m. – 11:15 a.m.

Walking the Talk: The Nuts and Bolts of Online Dissemination
Gabriela Fitz, Co-Director, IssueLab
If your organization is about to put out a report or publish an article, the least you can do is post it on your web sites or mention it through an e-Newsletter. What more can you do to get the news out to a bigger audience? We'll walk through a recent dissemination effort led by IssueLab, an online service that collects, archives and helps disseminate a range of nonprofit research, and use this example as a case study to go through the nuts and bolts of how you get your content, or your grantee's content, out to a larger audience. The session will include a group exercise in tracking down online audiences and in reworking, remixing, and repurposing research for an online audience.

This session will focus on highlighting ways that we can define audiences in the online world, how to establish goals and set expectations, how to find out where your audience is gathering online, and what tools and tactics are at your disposal to reach them. The session will emphasize the practical steps we can all take to improve our online dissemination skills, and also touch on the big picture of where we're trying to get to with our communications strategies overall.

Public Policy Strategies: Two Tools to Help You Keep it Real
Julia Coffman, Director, Center for Evaluation Innovation
Anne Whatley, Vice President, Cause Communications

More and more, foundations are embracing advocacy and public policy grantmaking as a way to better leverage their influence and improve their impact. Sometimes, however, there is a mismatch between where issues are in the policy change process and the strategies and tactics foundations use to advance them. For example, we know that awareness alone typically doesn't drive policy change, but how many public awareness campaigns have been funded with the expectation that they alone will move policy? Effective public policy grantmaking requires clear thinking about whether and why issues are stuck, and what it will take to "unstick" them.

This session will introduce two related tools that support realistic thinking about foundations' public policy strategies. The first is a visual framework that asks foundations to consider which audiences they need to engage and how far they need to "push" those audiences toward action. Based on those answers the framework then suggests which strategies may be most effective in moving those audiences forward. The second tool takes the next step, providing guidance to foundations determining which online outreach tactics (e.g., micro-blogs, wikis, social networking, SMS texting, etc.) will be helpful parts of their public policy strategies.

This session also will illustrate how to use both tools by engaging participants in discussion about a scenario based on real-life grantmaking experiences.

Using Contemporary Branding Strategy to Cross the Program/Communications Divide
Will Novy-Hildesley, Quicksilver Foundry
Diane Tompkins, Founder, The Curious Company

Most of us working in the nonprofit environment have gone through activities either in our own organizations or in partnership with grantees to clarify strategic goals and objectives. However, these efforts are usually long on process and consensus and short on actionable insight. As a result, these strategic planning efforts consistently fall short in providing nonprofit executives with real clarity, or the 'decision filters' they need to navigate their world. What we end up with are usually strategic plans that do not make eloquent cases for change, do not inspire the staff needed to carry out specific actions, and do not foster alignment or drive change.

If we were to apply a branding methodology to some of the strategic questions facing nonprofit staff, we might achieve greater clarity and integration with the results.

Whether you are trying to inspire staff or potential champions of your cause, or sell peanut butter to teens, three questions guide the decision to engage or move on: *Who are you? What do you do? And, Why does it matter? (To Me).*
In this session we will look at how non-profits can use a simple brand strategy framework to first

build clarity and integration internally, and then better communicate their purpose to external audiences.

Willing participants will then complete an analysis of their own brand strategy and work with us and their peers to refine it in real time. We will work together to apply the trinity of ‘Simple, Relevant & Different’ to the language you use to communicate your purpose and introduce you to the spartan discipline of capturing the essence of your value in less than a dozen words... Finally, we’ll discuss a common agenda to bring contemporary brand discipline to bear on our sector.

11:15 – 11:45 a.m. Break (Coffee, beverages, and snacks)

Concurrent Breakout Sessions, 11:45 a.m. – 1 p.m.

Brand, Meet Twitter. Twitter, Meet Brand
Eric Henderson, Director of Communications, Living Cities

Twitter and the entirety of microblogging and related applications remain hot topics, attracting not only attention, but even growth funding in these challenging times. Somebody believes there's a model here. Despite the fact that the names still tend toward the traditional, internet-cute and that these new services, like those of the previous wave, thrive without clear revenue models, it is incumbent upon communications professionals to know how to systematically weigh these vehicles – when to leave them alone and when to smartly deploy messages with them. Twitter is one we should deal with.

Many philanthropic organizations have a distinct opportunity to take advantage of Twitter, but also a responsibility to avoid the subtle danger of “brand abuse” and to avoid being left out of conversations that can be productive for your mission. This session will examine why we should learn Twitter.

The session will also include real-time demonstrations such as:

- Examples of effective use based on actual measures, historical and real-time.
- Demonstrations of the dangerous side, including: Archiving techniques intended and unintended -- Twitter examples to show that the web is not as much an ephemeral medium as it is a stone tablet; the difference between Friending and Befriending.
- Integrating Twitter across your total web footprint.

Finally, we will place Twitter in a larger context of our marketing strategy to provide a framework for measuring not only this but the next big thing.

Using Evaluation In Real Time to Improve Advocacy Communications
Tanya Beer, Assistant Director of Research, Evaluation & Strategic Learning, The Colorado Trust
Dede de Percin, Executive Director, Colorado Consumer Health Initiative
Ehren Reed, Senior Associate, Innovation Network
Moderator:
Christie McElhinney, Vice President of Communications & Public Affairs, The Colorado Trust

How do you know if the advocacy efforts your foundation supports are effective? Can advocacy organizations benefit from formal evaluations of their work, or does it just get in the way of their well-honed instincts? And what role does communication play, along with evaluation, in helping to increase the effectiveness of advocacy?

With its first foray into funding advocacy to help bring about health care reform, The Colorado Trust designed an innovative evaluation to answer these questions. Each of nine advocacy grantees has an "embedded" evaluator working in an advisory role to 1) build the grantee's capacity to evaluate their own work and incorporate real-time feedback into their strategies; 2) monitor the progress of each grantee toward its unique policy goals; and 3) assess growth in capacity of the health advocacy community in Colorado as a whole. Simultaneously, the evaluation examines grantees' collective progress toward promoting the necessary environmental conditions for policy change.

In this session, we'll share initial lessons on how this evaluation approach can help advocacy organizations increase positive media coverage, decrease opposition messaging and influence policymakers' positions. Additionally, we'll share early experiences of using rapid communication of real-time evaluation results to support policy change from the perspective of an advocacy grantee, an evaluator and the foundation.

If You Want to Go Fast, Go Alone. If You Want to Go Far, Go Together
Corrie Frasier, Manager, Content Distribution Strategy
Tyler LePard, APO, Global Health Communications
Bill & Melinda Gates Foundation

When the Gates Foundation set out to develop a new digital communications plan, it knew that success would ultimately rest on integrating program and advocacy into this work. While communications can develop the systems, create the channels, and manage the delivery of information and messages, the program teams are the subject matter experts, and their overall advocacy priorities guide the work.

Over the last several months, a core team from across the foundation's program advocacy groups and central communications have been working together to navigate the trail. In this candid panel discussion, the presenters will share the steps the Gates Foundation is taking to find new ways to work across teams to develop and distribute great content in support of the foundation's mission. They'll highlight best practices, challenges, and lessons learned along the way.

After sharing their experience, the presenters will lead a group discussion. The audience will select 1-2 themes from the presentation for further discussion together, we'll work through other creative ways to improve collaboration across teams.

1:00 – 2:15 p.m. Lunch

<u>Concurrent Breakout Sessions, 2:15 – 3:30 p.m.</u>

Informing Influential Americans, Policymakers About Philanthropy
Eric Brown, Communications Director, The William and Flora Hewlett Foundation
Vicki Rosenberg, VP, Education, Communications and External Relations, Council of Michigan

Foundations
Mark Sedway, Director, Philanthropy Awareness Initiative

Philanthropy, research shows, is isolated from influential Americans. Nearly nine out of ten can't give an example of a foundation's impact on their community or an issue they care about. And a majority can't even name a foundation on the first try. The consequences of this awareness deficit can be measured in missed partnership opportunities with other sectors and near political misses such as A.B. 624 in California. legislation that would have required large foundations to collect and publicly disclose certain ethnic, gender, and sexual orientation data pertaining to its governance, operations, and grantmaking.

A lot is at stake.

So what can be done? At this interactive session, we'll hear first about efforts to bridge the gap at three levels—foundation (Hewlett), regional (Philanthropy 3D-Michigan), national (Philanthropy Awareness Initiative). What's being tried? What's working? What stands in the way?

Then we'll get to the heart of the session, engaging participants in a conversation about what next. Or, maybe more to the point, who next? One of the most important challenges in this work is the search for philanthropy ambassadors. How can foundations better leverage their trustees, executives and grantees in reaching influential audiences? How can of these groups be mobilized—and to do and say what? We'll aim to end the session with a list of practical steps that communications officers can use to help in this work. We'll refine and package the steps and then distribute to Network members following the conference.

The Best Online Communications Tools You've Never Heard Of
Brooke Bailey, Director of Communications, Sisters of Charity Foundation of South Carolina
Karen Malone Wright, President/Owner, Odyssey Creative Communications

Lost amid the buzz around social media are an increasing number of online tools that can make life much easier for communicators and help grantees tell their stories more effectively.

For instance, hoping to rate the quality of your website for search engine optimization (SEO)? There's a site for that. Want to share your video with the world but YouTube creeps you out? There are sites for that, too.

Divided into four sections — Telling Your Story, Pitching Your Event, Fundraising Help and Just Plain Cool — this fun and informative presentation will show you new tools for enhancing both the look and effectiveness of online projects. Some are designed specifically for marketers, such as *pitchengine* and *eventbrite*, but we're betting sites like *befunky* and *meetup* will support your communications goals as well. Best of all, the majority of these tools are free!

Each section will include examples of foundations and/or nonprofits creatively using some of the spotlighted tools. Questions will be allowed throughout the session and participants are encouraged to share their real-life communications challenges to see if contemporary apps can make a difference. And yes, we admit that you may have heard of some of these sites before, but honestly, if you've only used Google to search for websites and images, you haven't seen anything yet.

Website Migration: When It's Time to Rebuild Your Site (Not Just Renovate It)
Christine Haran, Director of Online Information, The Commonwealth Fund
Megan Mermis, Communications Associate, The William and Flora Hewlett Foundation
Julee Newberger, Online Communications Associate, Annie E. Casey Foundation

Even non-techies understand what a website redesign involves. But how about a website migration? If a redesign is a website renovation, a migration is packing up all of your content and moving into a new home built to your specifications. In other words, migrations involve changing your site's underlying technology platform, the content management system, and often the hosting provider.

It's no small job, but migration can be worth it. The latest content management systems offer ease-of-use, improved organization, and more control over the site. And a new hosting arrangement may provide the stability that your site needs. But there is a lot of consider. This session will help you assess what you could gain from a migration and outline three possible approaches to rebuilding your site.

The presenters will address such questions as:

- Why undertake what is often an expensive and lengthy process?
- What are some of the major challenges you'll face?
- Will your migration involve a redesign or do you basically want a replica of what you have?
- Who can you trust to build your site and then move your precious content?
- How can you and your developers/designers prepare for a smooth migration?
- How do you set expectations internally?

Concurrent Breakout Sessions, 4:00 – 5:30pm

The Social Media Game
Gordon Mayer, Vice President, Community Media Workshop

Do Web 2.0 tools typically come up in the last 15 minutes of your board (or staff committee) meetings? Are eyes still rolling up in people's heads around your office at the mention of Facebook, YouTube, Twitter, FriendFeed?

We'll play the Social Media Game—a short interactive exercise that helps participants connect Web 2.0 tools to organizational goals. Then we'll debrief the game by discussing how to use it to get colleagues thinking about these tools in the context of achieving programmatic and organizational goals. As time allows, we'll also discuss the diffusion of the ideas of social media across the philanthropic and nonprofit sector.

This session will be useful to those who want a soup-to-nuts introduction to the "why, not how" of using social media to advance program work and strengthen organizations. It will also be helpful to those who are comfortable with Web 2.0 tools but need new ways to evangelize internal and external audiences to incorporate social media tools into your foundation's work.

From Defense to Darling: Communications Lessons in the Successful Campaign to Reauthorize SCHIP
Ed Walz, Vice President, Spitfire Strategies

Expanding children's coverage seems as though it would be an easy success—after all, who is against children? At the heart of the debate, however, is not the issue about what is good or not good for children, but rather a deep ideological division over the way health care in America should be structured and the role of public programs.

This case-study session focuses on the reframing of the national conversation around children's coverage—moving it from a conversation of costly, broken government programs to one focused on the success and popularity of children's coverage through Medicaid and CHIP (Children's Health Insurance Program). The campaign resulted in a high-profile signing ceremony in the first days of the Obama White House and coverage for 4 million more children, including legal immigrant children and pregnant women. Over the course of this reframing campaign, advocates on the state and national level crafted messages that reclaimed the positive vision of these programs. Core national and state leaders lead the effort to train allies on the reframing strategy and to coalesce around the new messaging.

This is a session for anyone wanting to learn specific strategies for developing and implementing a successful issue campaign in tough times.

360° Storytelling: A Thinking Organization's Guide to Documenting & Sharing the Work
Presenter/Moderator: Helen Lowe – President & Creative Strategist, Catalytica, Inc.
Panelists: Kevin Corcoran – Program Director, Lumina Foundation for Education
Juan (Kiko) Suarez – Sr. V.P. External Affairs, Lumina Foundation for Education

Too often stories about a foundation's grantmaking efforts—impact in the field and lessons learned—are created in a kind of vacuum, by communications staff with too little access to the work in the field, or by consultants who are often not close enough to the foundation to sufficiently communicate the depth and nuance of issues and messages, calling into question the value of such efforts from both a cost and impact perspective.

Operational models and perceptions can create a disconnect between the interrelated work of communications and program, leading to costly inefficiencies, missed learning opportunities, frustrated (and sometimes adversarial) foundation staff, and disappointing results that miss the mark.

In this session, you'll see how visual documentation of initiatives can be leveraged as qualitative data to inform grantmaking strategies (the territory of program and evaluation) and used as storytelling tools that highlight what an organization is funding and learning (the territory of communications and advocacy).

The session will showcase a practical model that can help organizations develop efficient and effective visual communication strategies, including examples of how it can be used to help close the gap between program and communications.

6:00 – 8:00 pm Offsite Reception -- United Nations

Friday, October 16, 2009

Concurrent Breakout Sessions, 9:00 – 10:15 a.m.

Communication and Program Efficiency: Divorcing Traditional Models in KnowHow2GO to Make Way for Big Love
Teresa Detrich, Director of Electronic Communication, Lumina Foundation
Nushina Mir, Evaluation Officer, Lumina Foundation
Louie Herr; New Media Consultant

This session will highlight a social-marketing campaign designed to encourage low-income and first-generation students in grades 8 through 10 to take the steps necessary to prepare for college. The campaign, *KnowHow2GO,* which was funded by the Lumina Foundation, relied aggressively on new media, free Web platforms, and social online networking, in addition to thetraditional grassroots outreach model.

During the session we will explore the interrelationships and dynamics that helped shaped KnowHow2GO, which also involved partnerships with the Advertising Council, the American Council on Education, and Academy for Educational Development. In addition, the session will feature examples of some of the new media tools used in the campaign -- Viral Video, WordPress and Ning - and presenters will also discuss how evaluation and media tracking have informed the different electronic outreach efforts.

High-Impact Advocacy: Tools & Techniques Across the Advocacy Value Chain
Doug Hattaway, President & CEO, Hattaway Communications
Alex Cole, Director of Philanthropic Services, Hattaway Communications

Foundations play many roles in advocacy, with investments and initiatives across the “advocacy value chain” – from analyzing the policy landscape to evaluating the impact of advocacy efforts. In this session, participants will see how foundations and grantees are using time-tested best practices and leading-edge tools from business, politics, grassroots organizing and interactive technology to advance their goals in policy change and public education. Participants will hear stories from successful advocacy campaigns and brainstorm ways their foundations can advance their advocacy efforts.

Participants will learn about tools designed specifically for foundations to strengthen advocacy, including:

- Issue landscape analyses and advocacy strategies
- Cost-effective research methods
- Messages to motivate and mobilize supporters
- Tools to help advocacy coalitions deliver consistent messages
- Online tools for constituency mobilization and public education
- Metrics to assess advocacy and communications impact

Participants will map out and receive feedback on their ideas for supporting advocacy efforts along the value chain on an issue of their choice.

How to Monitor Your Foundation’s Reputation and Issues: Social Media Listening Strategy and Tools
Larry Blumenthal, Senior Communications Officer, The Robert Wood Johnson Foundation
Holly Ross, Executive Director, NTEN
Nancy E. Schwartz , Blogger, GettingAttention.org / President, Nancy Schwartz & Company
Chipp Winston, Web Manager, Soros/OSI

The daily volume of content and conversations created in social media channels – blogs, Facebook, Twitter and more – is huge, and growing exponentially. You need to keep on top of it all and respond appropriately, in addition to all your other communications responsibilities. Here's an example: 1.4 new blogs are created every second and you need to know if any of them feature conversations about your foundation, leaders, programs, grantee or issues.

Making sense of all the content and conversation out there is challenging, but the right strategy and tools will enable you to filter out key conversations. In this panel discussion, richly illustrated with case studies from grantmakers listening hard and well, we will show you how to:

- Find out who's talking about your foundation and what they're saying
- Organize and share the information and insights with your colleagues so your foundation can capitalize on it
- Integrate all this into your workflow so it gets done without overwhelming you
- Respond and build community through conversation.

Facilitator Nancy Schwartz will frame the discussion, outlining why listening and responding is an imperative for grantmakers. Next, panelists Larry Blumenthal of The Robert Wood Johnson Foundation and Chipp Winston of OSI/Soros will share experiences and advice. Blumenthal will focus on Twitter and how RWJF listens, what it's learning and how team members are integrating this effort into existing responsibilities. Winston will discuss OSI's online reputation management program – what it listens to and how, and its response approach – and the foundation's first steps in trying to shape its reputation based on these findings. Finally, NTEN Executive Director Holly Ross will provide guidance on effective responding, and its impact on your team's workflow and workload.

<u>Concurrent Breakout Sessions, 10:30 - 11:45 a.m.</u>

Using Traditional Media in Non-Traditional Ways
Lisa Keske, Project Coordinator, Northwest Area Foundation
Sheila Kim, Director of Technology for Public Insight Journalism, Minnesota Public Radio
Julie Lee, Program Communications Consultant, Blue Cross and Blue Shield of Minnesota Foundation
Keith Parker, Director of Special Partnerships, Twin Cities Public Television

Twitter, Facebook, Linked In, Digg, You Tube — we've all attended workshops and seminars that boggle our minds with the possibilities of new media. But are traditional media outlets a thing of the past?

Minnesota Public Radio uses virtually all electronic technologies — radio, internet, podcasts, Twitter, HD radio, web-based video, iPhones, social networks and web-based content. Its Public Insight Network involves participatory journalism, enabling reporters to tap the expertise of thousands of people who have experience or knowledge on a story being covered. And with the transition to digital television, Twin Cities Public Television's MN Channel is changing the way it shoots, produces and shares programming, as well as increasing its commitment to online and on-demand services. New in 2009 is a video vault, a treasure trove of history for the digital age. All of the material is closed-captioned and, through advanced search functions, these captions can be searched to locate any word spoken within a program.

During this interactive panel discussion, hear how traditional media and two foundations are partnering to increase public awareness on issues by expanding their presence in social media and ensuring continued high-quality journalism during a time of shrinking newsroom budgets.

Where's the Starting Point? Determining Baselines for Communications in Public Policy
Edith Asibey, Principal, Asibey Consulting

One of the most common challenges to assessing the effectiveness of a communications initiative is the lack of a starting point: what did things look like before work began? This is particularly true for communications intended to ultimately influence policymaking.

The presentation will discuss how to develop a solid communications baseline and a continuous monitoring system. Using two current examples of advocacy and communications initiatives, the session will discuss how to use media monitoring, surveys, interviews, social media 'listening' channels, and other tools to determine a starting point. The presentation will also discuss how these monitoring practices can help nonprofits and grantmakers develop a better dialogue about what the communications are achieving over time.

Attendees will learn how they can to establish their own baseline at a low cost, along with what to avoid, and how to apply what is learned to make mid-course corrections. Attendees are encouraged to think in advance of their own needs: What information would you need to collect before starting with a new communications effort?

Diversity and Inclusiveness: Beyond the Buzzwords
Moderator:
Vicki Rosenberg, Vice President of Education, Communications and External Relations, Council on Michigan Foundations (CMF) and leader of the Transforming Michigan Philanthropy through Diversity and Inclusion Project.
Panelists:
Holly Minch, Communications Consultant to the Evelyn and Walter Haas, Jr. Fund and leader of the Let California Ring project.
Paul Bachleitner, writer and author of Diversity in Philanthropy Project communications case study, "How Are Foundations Communicating Their Work on Diversity?"
Rebecca Arno, Vice President of Communications, The Denver Foundation, and co-editor of Inclusiveness At Work: How to Build Inclusive Nonprofit Organizations

How well is your organization keeping pace with the changes in your community? Are you reaching the broadest range of people you need to engage to truly achieve your goals? As demographics shift in the U.S. and around the world, more funders than ever recognize that they can't accomplish their missions of social change without addressing issues of race, class, and difference. And for communicators, this means developing the skills to connect with an increasingly diverse range of communities. This session combines stories from the front lines with sector-wide perspectives on building these skills.

Attendees will:

- Learn how “diversity and inclusiveness” move beyond concept and into concrete action – from fighting for marriage equality in California to helping Colorado youth end the cycle of violence.
- Glean best practices from a newly released study of how experienced professionals nationwide communicate effectively with diverse audiences to accomplish their foundation’s goals.
- Gain insight into your own foundation’s work with diverse communities; the presenters will test best practices on a select group of issues presented by the audience.

From Boring to Fun: A Public Education Campaign That Worked and Why
Fred Sainz, Vice President, Communications and Marketing, Gill Foundation
Jim Jonas, Principal, Peak Creative Media

Since 2005, the Colorado Legislature has passed five laws that protect and enrich the lives of lesbian, gay, bisexual and transgender (LGBT) residents of the state. The problem? The state’s LGBT population didn’t know about any of them. There starts the tale of an integrated communications and marketing effort to educate a hard-to-target population about the important rights and protections afforded to them by government and to increase their usage over time.

If you attend this session, you will leave with a clear understanding of how to transfer the successful strategy and tactics of this campaign to your public education efforts. Strategically, you’ll learn how turn the boring – in this case, five disparate laws – into a fun and clever campaign that is highly consumable by citizens at all levels. Tactically, you’ll develop an understanding for how to ferret out hard-to-target populations with messaging and techniques that work.

For advance information about the campaign, visit www.therightsfive.com

11:45 – Noon Closing remarks