

THE WILLIAM AND FLORA HEWLETT FOUNDATION

Dear Colleagues,

The Hewlett Foundation has been supporting communications training programs for our grantees since shortly after I arrived at the Foundation in 2003. Borrowing heavily from approaches developed by the Robert Wood Johnson Foundation, the David and Lucile Packard Foundation, and others, our goal is to help our grantees learn how to create and implement effective communications strategies in order to achieve the goals of their organizations.

After many years of providing training to grantees, I nevertheless found myself unable to answer a fundamental question: Do they work? The fact is, while I have observed that our grantees appear to benefit from this approach, and participants nearly always report that they have found these programs to be useful, until now we have not sought to answer that question with sufficient rigor.

Last year, the Hewlett Foundation hired Williams Group to conduct an assessment of the various training programs we have offered to our grantees over the years. These programs included trainings designed for: grantees from all the Foundation's grantmaking programs; grantees from a particular field (e.g., a communications training that brought together grantees working on community college education); and the chief executives of organizations in a program that included grantees of other foundations.

Every program featured an emphasis on creating a solid communications strategy using the Smart Chart[®], the indispensable tool developed by Spitfire Strategies. The Smart Chart was taught by the staff of Spitfire Strategies, with a variety of communications consultants also participating as trainers. In addition, the curriculum included sessions on how to create and deliver compelling presentations, how to use social media effectively, and how to improve storytelling skills, among many other topics.

So what did we learn? Three key things emerged from this assessment:

1. The trainings are excellent. It was no surprise that grantees who had participated in a Hewlett-sponsored training, even several years ago, still remark on the high quality of the trainers, the tools, and the curriculum.
2. Recruitment is key. Again, we suspected this to be true, but the researchers confirmed that having the right mix of senior staff and implementers from an organization is a prerequisite for success. The researchers also confirmed that selecting organizations with the capability to implement the lessons of the training is critical.
3. Follow-up by the Foundation is essential. Training can be very helpful, but the Foundation will have to do a better job of following up with our grantees than we have done in the past. There has to be a system to ensure that grantees use the follow-up technical assistance built into the program, that program officers at the Foundation personally speak with their grantees about what they learned, and perhaps most important, that Hewlett program staff ask for the communications plan or campaign plan that the grantees created during the training. I was frankly disappointed to learn that a very small percentage of our grantees who participated in one of our trainings could readily produce a communications plan upon request.

And now a word about how Williams Group approached the study. Williams Group attempted to contact every single participant of a Hewlett communications training to administer an online survey. The response rate was very high—more than 50 percent. Williams Group then followed up by conducting 40 in-depth interviews to discover more about what grantees learned, to understand how they now approach strategy and to evaluate the quality of their current practices. Finally, Williams Group created 10 short case studies that provide further insight into the effects of the training.

All the data from these surveys and interviews have been compiled and are available for review on an extremely comprehensive website. As far as I know, it is the most rigorous set of data about communications training publicly available. We think that funders, nonprofit organizations, and other communications practitioners will find this wealth of information particularly valuable as they consider how to help nonprofit organizations become more effective.

Sincerely,

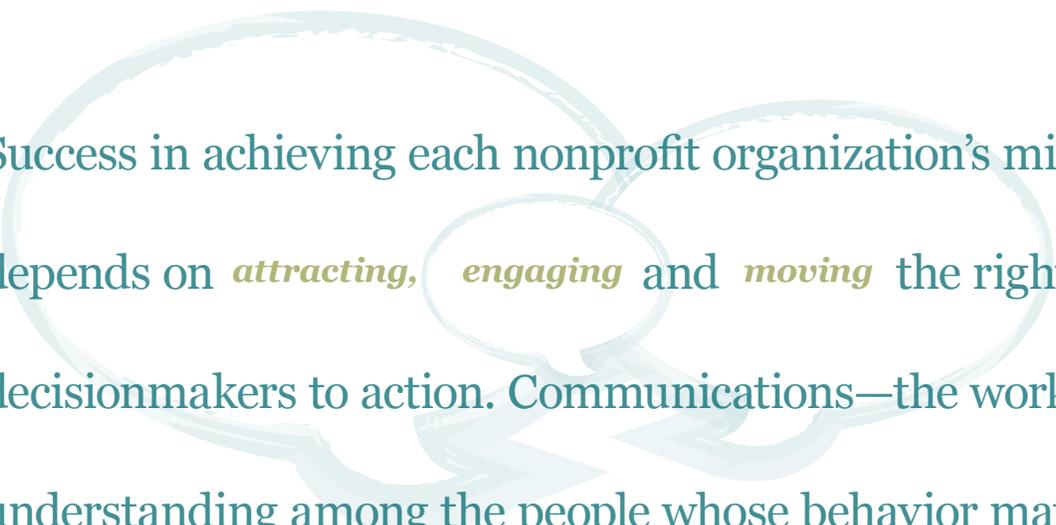


Eric Brown
Communications Director
The William and Flora Hewlett Foundation
March 2011



What nonprofits say

A study on the effectiveness of communications training



Success in achieving each nonprofit organization’s mission depends on *attracting*, *engaging* and *moving* the right decisionmakers to action. Communications—the work of creating understanding among the people whose behavior matters most to a mission—is a vital function. The absence of adequate communications renders even the best nonprofit intentions and actions unnoticed, misunderstood, and ineffective. Successful nonprofits view and support communications as integral to their overall strategy and a lever to create the change they seek.

Contents

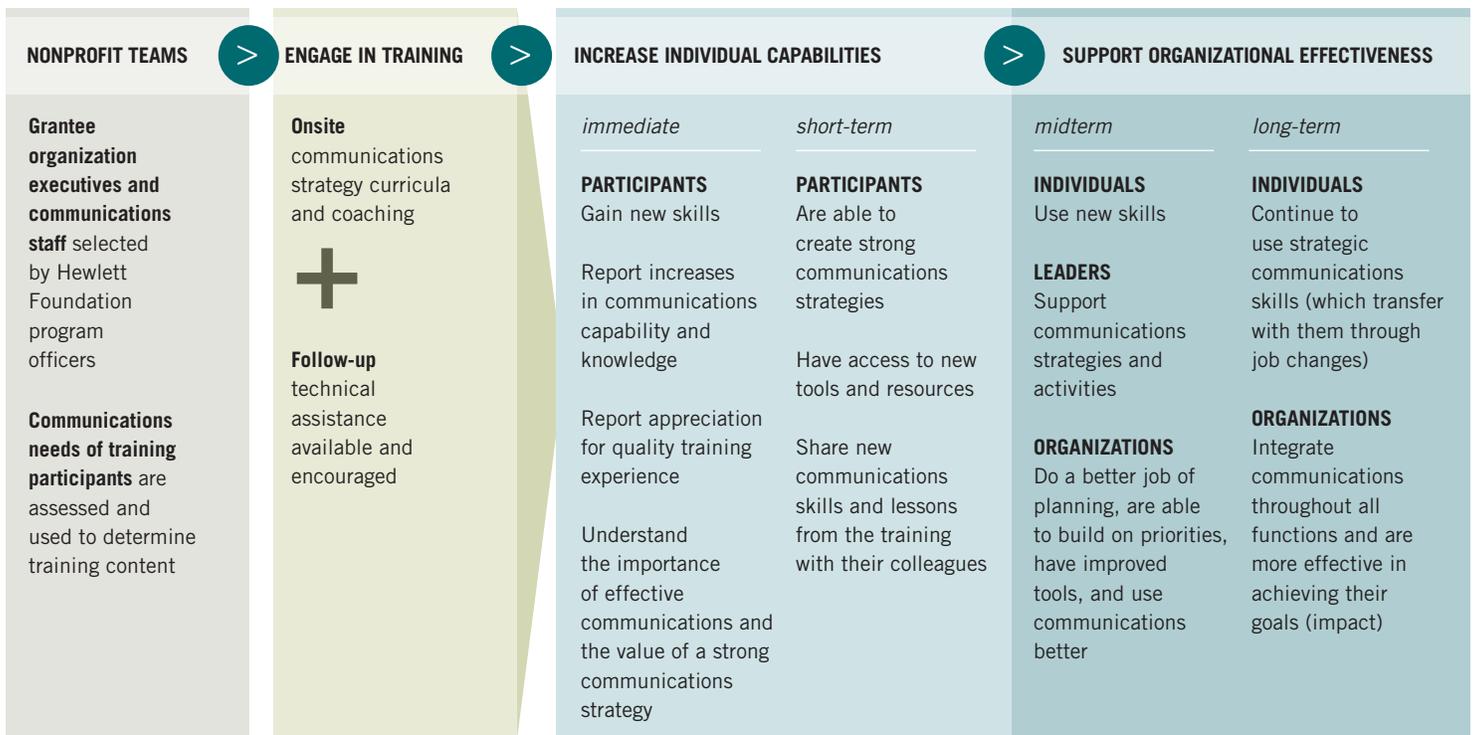
Communications Training at a Glance	1
About the Training	2
Effectiveness Study	4
Finding No. 1: Training was high quality	6
Finding No. 2: Training alone isn’t enough	9
Finding No. 3: Impact can be strengthened	13
Assessing Participant Communications	15
Tools to Improve Training	18

Find complete study results at whatnonprofitsay.org

The William and Flora Hewlett Foundation believes that organizations with solid communications strategies and the means to carry them out are far more likely to achieve their goals. For this reason, the Foundation has offered an intensive, multi-day communications training program for its grantees. In the past five years, hundreds of grantees have participated in training that is designed to improve the communications skills of individuals working for these organizations, and to help their organizations succeed.

Communications Training at a Glance

The following diagram illustrates the thinking behind the design of the Hewlett Foundation’s communications training programs.



About the Training

Participants for the communications trainings were selected by Hewlett Foundation program officers, who made their decisions based on a variety of criteria, including perceived communications need and potential, and with the intent to offer this opportunity equitably across Hewlett Foundation program areas.

Three types of training were offered at different times to distinctive groups of grantees. The most common experience was a comprehensive three-day session designed for a large, diverse selection of Hewlett Foundation grantees across a variety of issue areas with a mixed set of skills and experience. Tailored training programs were offered to selected groups of grantees working in particular issue areas or geographic locations. Additionally, a more intensive program brought individual nonprofit executives together three times over the course of a year to study communications principles and practices in depth.

An important component to these training programs, Spitfire Strategies has been engaged by the Hewlett Foundation since 2005 to design and deliver training sessions customized to the needs of individual organizations selected to participate. Spitfire also led the year-long intensive training experience geared exclusively for nonprofit executives, including Hewlett-sponsored participants since 2005. All training sessions the Foundation offered its grantees during the five years studied made use of the Smart Chart[®], a Spitfire planning tool, and involved Spitfire instructors.

TYPE OF TRAINING	Timing	Number of individuals participating	Number of organizations participating
Core training experience: diverse mix of participants and topics; three days in length	2009	36	17
	August 2008	45	20
	June 2008	32	31
	2007	36	34
	2006	41	37
Tailored training: organizations focused on global development	2009	50	20
Tailored training: California community colleges	2008	49	35
Tailored training: California organizations engaging policymakers	2007	26	15
Intensive executives-only training: several days in length over the course of a year	2009	1	1
	2007	7	7
	2006	6	6
	2005	3	3

While training experiences varied, each involved presentations, hands-on work sessions and group dialogue. Most sessions took place over the course of two to five days, with a few sessions spanning several days over several months. Follow-up technical assistance was offered in all cases, although not all participants took advantage of it. Training covered a number of topics with emphasis on communications strategy and audience messaging, as well as key tactics, including presentation delivery and storytelling.

Agenda Topics

- Planning strategic communications
- Setting clear communications objectives
- Identifying target audiences
- Crafting clear, compelling messages
- Communicating in three minutes or less
- Capturing communications stories
- Developing effective PowerPoint® presentations
- Engaging policymakers
- Earning media coverage
- Leveraging social media

Measuring Immediate Training Effects

Before and after each training session, the training provider surveyed participants to understand their communications knowledge and to identify changes in this regard. In all areas of training emphasis, participants reported improvements following training. The Hewlett Foundation acknowledges that the ratings reflect participants' self-perceptions and that participants may have been somewhat biased in over-reporting improvements. Nevertheless, the interview data and third-party assessments by the Williams Group team similarly suggest that participants' communications knowledge improved, at least to some degree, over the course of training.

RATE HOW MUCH YOU CURRENTLY KNOW ABOUT THE FOLLOWING COMMUNICATIONS SKILLS (1 = NO KNOWLEDGE; 7 = GREAT DEAL OF KNOWLEDGE)	Before training (n=81)	After training (n=61)
1. Strategic communications planning	3.97	5.38
2. Setting clear communications objectives	4.59	5.60
3. Identifying target audiences	4.84	5.82
4. Crafting clear, compelling messages	4.42	5.56
5. Communicating what my organization does in three minutes or less (i.e., elevator speech)	4.69	5.84
6. Capturing communications stories about my organization's work	4.50	5.83
7. Designing PowerPoint presentations that are visually compelling	3.59	5.10
8. Developing effective PowerPoint presentation content	3.32	5.45
9. Engaging policymakers	3.79	4.72
10. Earning media coverage	3.88	5.10
11. Leveraging social media (Facebook, Twitter, Flickr, MySpace, YouTube, etc.)	3.34	4.87

Effectiveness Study

After offering communications training opportunities to grantees for five years, the Hewlett Foundation engaged Williams Group, an independent communications design firm, to assess the effectiveness and accomplishments of the programs.

The purposes of this study were to:

- Better understand the value of communications training programs for grantees
- Continue to improve how training programs are designed
- Track program participants and measure how they've used what they've learned
- Help other funders learn about approaches to help their grantees improve their communications strategies

Key Findings

Examination of survey and interview results led Williams Group to draw three major conclusions:

1. The training experience was of excellent quality.
2. Training alone isn't enough to transform communications, an organization, or its impact.
3. Impact of training can be strengthened through strategic participant selection and comprehensive reinforcement.

The resulting nonprofit communications training study involved more than 200 individuals representing nonprofit organizations that currently receive or have recently received grant dollars from the Hewlett Foundation. The study included:

- 181** survey responses from individuals who took part in Hewlett Foundation-sponsored communications training
- 38** survey responses from individuals who did not receive the training but who broadly represent Hewlett Foundation grantee organizations
- 40** interviews of past training participants broadly representing grantees who completed surveys; included review of communications planning documentation and materials, if available
- 10** case studies for greater understanding of individual experiences and results; subjectively selected based on interviews and materials submitted
- 1** observation of a live three-day training session in 2010

Considering the Data

All training participants described in the table on page 2 were invited to complete an online survey. A total of 219 surveys were analyzed as part of this study. This number includes 181 survey responses out of a pool of 332 individuals who took part in all types of training experiences offered through the Hewlett Foundation, as well as 38 survey responses out of a pool of 85 grantee organizations that did not receive Hewlett Foundation-sponsored communications training.

More than 50% of all training participants responded to the survey. Results are presented at a confidence level of 95% (within an interval of 5) but are also subject to a non-response bias (i.e., individuals who did not respond to this survey may have different answers than those who did respond). Multiple follow-up methods were used to encourage all training participants to respond to this survey. As reported answers on communications capabilities and knowledge align with pre- and post-training answers to similar questions, it may be inferred that survey results are representative. The small sample of non-trained grantees surveyed is for comparison purposes only (without statistical inference).

Initial analysis showed that participants in specialized training programs, such as training tailored to a particular group or issue of interest or intensive and lengthier training offered to executives only, varied from those receiving the more common training experience. For this reason, numerical data (e.g., charts and tables) presented in this study represent only the survey responses of participants in the “core,” or most common training experience (104 survey responses) and omit responses by those who experienced a specialized training (77 survey responses). Findings from these distinctive experiences are noted where deemed significant.

Additionally, study findings should be interpreted with care and consideration of these three factors:

- **Training varied over time**, most significantly in the areas of curriculum, delivery method and duration, and participant selection.
- **Comparative evaluation was limited.** Individuals were engaged for this study as many as five years following their participation in training. Efforts to understand their progress over time were limited to comparing survey self-ratings on communications capability and knowledge given at the time of training and more recently, and assessments made during the course of phone interviews and review of present-day communications materials. Organizations that did not participate in training were also asked to complete a survey with similar questions to gauge their communications capability and knowledge, though the size and differences in experience of this comparison group prevent it from constituting a true “control” group.
- **Participation in this study was voluntary.** However, due to the power dynamics inherent in the funder-grantee relationship, grantees may have felt obliged to participate in a study offered by their funder and to respond favorably to survey questions in order to maintain good rapport with the funder. To counteract this possibility, grantees were assured that their responses would remain anonymous and – except for case study summaries – would not be individually identified to Foundation staff.

Finding No. 1

The training experience was of excellent quality.

Past and recent surveys, interview conversations, and live observation of training suggest that training quality was high. Most training participants count the training opportunity sponsored by the Hewlett Foundation among the most interactive and useful training sessions they have experienced.

In particular, respondents valued the **caliber of speakers** and the **topics and content presented**, among other aspects of training.

Participants reported high levels of satisfaction with training and increases in their communications capability and knowledge, as well as the value they place on communications. Many also reported gaining new skills as a result of training. Almost half (48.1%) surveyed said that given additional resources, they'd choose to send additional staff to training of this type over other options.

PARTICIPANTS SAY

training was well worth the time...

"I haven't been to a training since of greater value."

"It was definitely one of the more stimulating trainings ever."

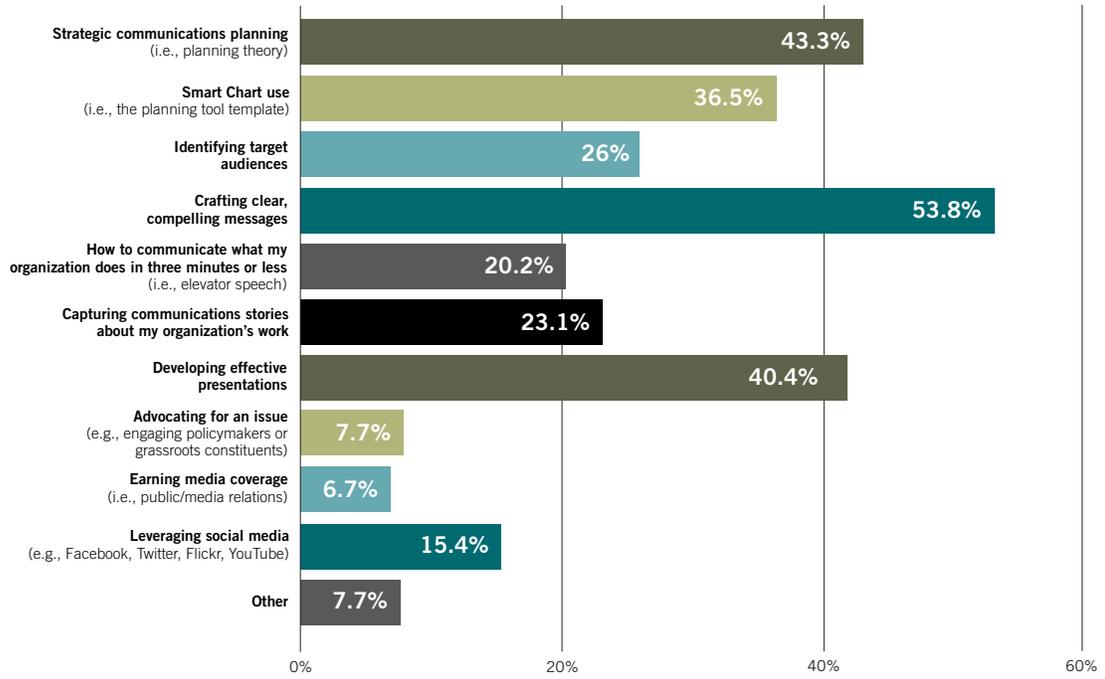
"If I could send the other staff here I would, partly because it's a great awareness builder—I think that's one of the key benefits of it."

"Most important was the chance to interact with my peers—to find out what worked for them and what didn't."

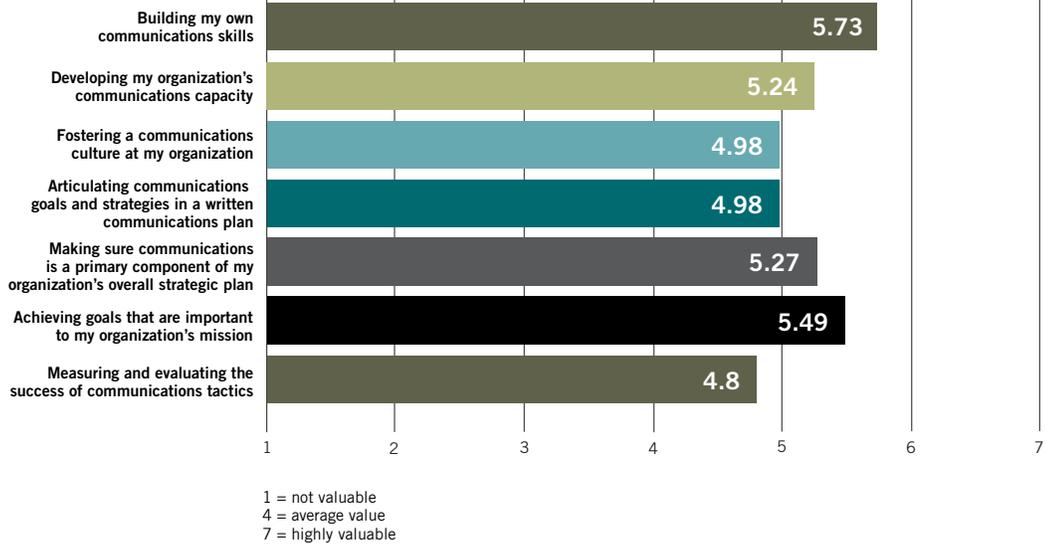
"It was helpful to go away for three or four days as opposed to spending one hour taking a webinar and then trying to put that to use."

WHICH TRAINING TOPICS COVERED IN THE TRAINING PROGRAM HAVE PROVEN TO BE MOST USEFUL TO YOUR ORGANIZATION?

Participants were asked to select up to three training topics.

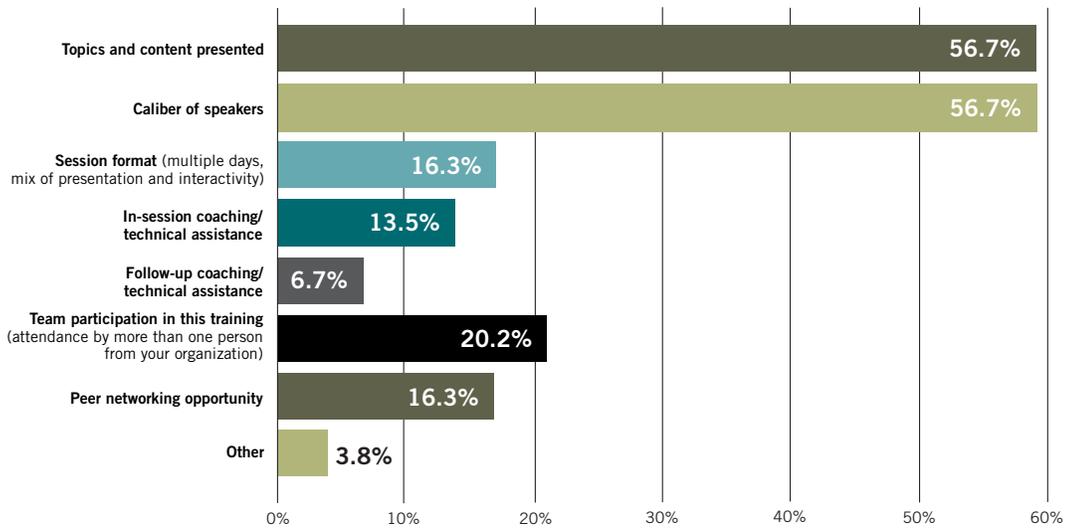


HOW VALUABLE WAS YOUR TRAINING EXPERIENCE TO THE FOLLOWING ACTIVITIES?



WHICH ASPECTS OF TRAINING DID YOU VALUE MOST?

Participants were asked to select up to two training topics.



Finding No. 2

Training alone isn't enough to transform communications, an organization, or its impact.

Communications training may be one ingredient in increasing an organization's communications capabilities. Other essential characteristics include:

- **Leaders who endorse and support** communications as a means of advancing the organization's goals, and communications is generally valued and supported by the culture of the organization.
- **Human and financial resources that are available** to invest in additional communications strategy and implementation subsequent to training.

In addition to demonstrating these critical characteristics, organizations poised to take greatest advantage of communications training also experienced a **period of positive transition**—such as the startup of an organization, the addition of a new leader, the infusion of new funding and/or the establishment of a new program—giving communications lessons learned immediate relevance and application.

Organizations in all of the above circumstances credited training with increasing their awareness of the importance of communications, and therefore, their support of it. As a result, these organizations often allocated more funding to communications relative to their total budgets, and many also fortified their teams with additional communications staff or hired communications professionals on a contract basis.

PARTICIPANTS SAY

they need more than training...

"Training was one factor. It's hard to separate it out."

"It's hard to pick out what I learned in training from everything else I've learned over the years."

"We have zero people dedicated to communications as a full- or part-time job responsibility. No, we don't have the human resources we need."

"One training session is not that big of a deal. We know this from our work—people tend to think of professional development as 'going to something.' It needs to be part of ongoing work. No matter how good it is, it's just a workshop. It's how you bring it back... and that is a whole lot harder."

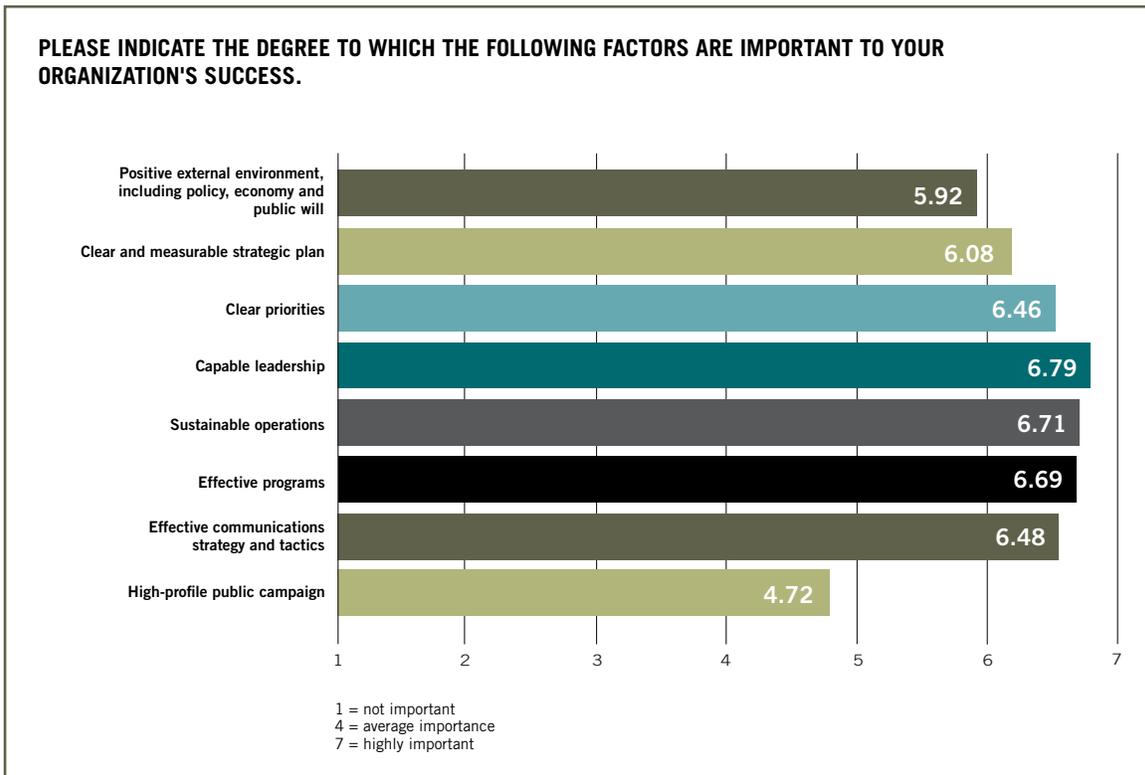
"Last year was a difficult year. I don't know what organizations did not contract. This year, we're back to 2008 levels. We're rebounding."

For most organizations, a single training experience may build individual awareness, appreciation, and skill—but those gains are not likely to increase over time, spread to others, or transform the organization as a whole without additional, ongoing support.

Although communications planning was a significant focus of the training experience, of the 38 organizations for which individual training participants were interviewed in this study, only eight were able to produce communications plans or strategic plans including a significant communications component. Ten others shared different types of communications planning-related materials, such as messaging documents, communications calendars, or simple documentation of major planning ideas.

Some organizations reported shortfalls in human and financial resources they believe critical to carrying out their communications strategies. Small organizations, when compared to medium and large organizations, reported more frequently that they did not have the knowledge, staffing, or resources to promote the use of communications in their organizations.

In addition to reporting that lack of organizational resources undercut the effects of training, respondents cautioned that training alone does not improve an organization’s communications and impact. For example, some commented that the Hewlett Foundation-sponsored training experience was one of many opportunities to learn and grow, and it was encountered in the midst of organizational challenges—some directly and others indirectly related to communications.



With Additional Resources, Training Transforms

CALIFORNIA ALLIANCE FOR ARTS EDUCATION

Consumed by her organization's campaign to build significant statewide support for arts and music education, Laurie Schell, executive director of California Alliance for Arts Education, was less than eager to leave the office for multiple days of communications training in 2006. But her Hewlett Foundation program officer strongly recommended it.

"At the training," said Schell, "I was introduced for the very first time to branding. I also learned about crisis communications and about communicating an ask. It was all there. These were new concepts for me, and we have put them to very good use."

Training also helped Schell launch a strategic communications plan she continues to use today. "The notion of strategy—of creating a strategic plan around communications—was such a new idea for me. It was really an aha for me to think about communications in that way—in a much broader context rather than from a tactical point of view." Upon returning to the office, "I found myself asking questions about every tactic, asking about the larger strategic goals preceding it," recalled Schell. She described training as "transformative as very few things are."

She also cautioned: "Training was not enough to help me do this job myself." Success in communications, she said, also calls for financial and human resources. "The tipping point came after I identified a funding source and brought in a consultant to do an internal audit and assessment of communications to create the communications plan. Training was an influence—but none of it would be possible without staffing."

Laurie Schell attended an intensive executives-only training, which extended several days over the course of a year.

Comparing Self-Evaluations

The tables that follow compare average scores on communications capability and knowledge from self-evaluations completed by participants in the most typical training experience within 30 days prior to training, immediately following training (where data were available), and from a recent online survey. Though training participants reported increases in their capabilities immediately following training, these self-ratings did not change substantially over time.

Similar survey questions were posed to a small group (85 invited, 38 responded) of Hewlett Foundation grantees that did not receive training. No inferences could be made about these self-ratings on communications capabilities and knowledge; these ratings did not vary significantly from ratings training participants gave themselves in a recent survey. The sample of non-trained grantees included approximately 10% more executive directors than the sample of trained survey respondents. The non-trained grantee group also included more mature organizations than the group of training participants. Finally, it may be that members of the non-trained grantee group were not selected to receive training because they were in less need of communications coaching or because they were not positioned to make use of it.

DESCRIBE YOUR ORGANIZATION'S COMMUNICATIONS CAPABILITIES RATING AGREEMENT WITH EACH STATEMENT (1 = STRONGLY DISAGREE; 7 = STRONGLY AGREE)	Pre-training (n=158)	Surveyed online recently (n=104)	
1. Currently, my organization uses communications effectively	4.49	4.86	
2. Communications is important to the success of my organization	6.78	6.52	
3. I promote the use of communications in my organization	5.84	6.19	
4. It is my responsibility to promote the use of communications in my organization	6.04	5.66	
5. I have the capacity (in terms of knowledge, staffing, resources) to promote the use of communications in my organization	4.62	4.84	
6. All staff in my organization should know how to use communications effectively	5.91	5.81	

RATE HOW MUCH YOU CURRENTLY KNOW ABOUT THE FOLLOWING COMMUNICATIONS SKILLS RATE KNOWLEDGE OF EACH SKILL (1 = NO KNOWLEDGE; 7 = GREAT DEAL OF KNOWLEDGE)	Pre-training (n=81)	Post-training (n=61)	Surveyed recently (n=104)
1. Strategic communications planning	3.97	5.38	5.16
2. Setting clear communications objectives	4.59	5.60	5.48
3. Identifying target audiences	4.84	5.82	5.80
4. Crafting clear, compelling messages	4.42	5.56	5.63
5. Communicating what my organization does in three minutes or less (i.e., elevator speech)	4.69	5.84	5.75
6. Capturing communications stories about my organization's work	4.50	5.83	5.38
7. Designing PowerPoint presentations that are visually compelling	3.59	5.10	4.66
8. Developing effective PowerPoint presentation content	3.32	5.45	4.89
9. Engaging policymakers	3.79	4.72	4.66
10. Earning media coverage	3.88	5.10	4.92
11. Leveraging social media (Facebook, Twitter, Flickr, MySpace, YouTube, etc.)	3.34	4.87	4.46

Finding No. 3

Impact of training can be strengthened through strategic participant selection and comprehensive reinforcement.

Though the Hewlett Foundation-sponsored training experience was high quality, surveys and interviews suggested opportunities to improve.

Four Recommendations

- A. Ensure readiness for training.** In cases where training proved highly valuable, participant organizations had or were able to put adequate human and financial resources into place to support communications, and, in many instances, they were on the verge or in the midst of a key organizational transition (e.g., new organization, new funding, new leadership, or programmatic change).
- B. Invite participation of teams (only).** Training time was most highly valued by participants who did not attend training alone. Joined by a team member, participants felt better able to apply training lessons to their actual work while in training and to bring lessons back to the office. Those who attended alone wished they had been joined by at least one partner. Ideal training teams included a decisionmaker vested with authority (e.g., executive director) and an implementer (e.g., communications or program officer).
- C. Conduct robust follow-up.** Lessons learned in training fade fast unless they are reinforced. Existing follow-up includes optional technical assistance, but this may not be enough and not everyone took advantage. Participants suggested additional courses to refresh or deepen skills, and ongoing Foundation encouragement of and involvement in strategic communications.
- D. Integrate communications with program strategy.** Just as organizations are encouraged in training to make communications an integral part of their strategic program work, the Foundation can play a role to incorporate communications into the development, management, and evaluation of grants/programs. This may involve financial support for communications and ongoing dialogue initiated by Foundation program officers.

TRAINING PARTICIPANTS SAY

how training can get better...

“People in my cohort who seemed to benefit the most were the ones who came in pairs, where they had an executive director and a communications staff person and could process what they were learning immediately and had the capacity as an organization to think about impact.”

“It’s easier to do things at ‘camp’ than it is to bring them home—that’s harder. If I could recommend one thing it would be closer follow-up: What could have been done immediately and soon after to reinforce [lessons learned] once you go back to the office? Something systematic.”

“I wonder if training principles could be integrated into [the Foundation] grant process... Maybe somehow hold grantees accountable to the lessons learned in training, making a component of the grant money tied to communications.”

Startup Makes Training Part of Growth Plan

SEACHANGE CAPITAL PARTNERS

Launched in 2006, SeaChange is in the nonprofit business of arranging transformational funding for organizations working in education reform and youth development for low-income young people. Two years after launch, SeaChange Managing Partner Lincoln Caplan attended training. “We didn’t have an organization then,” he said in a 2010 interview. “Now we’re 10 people.”

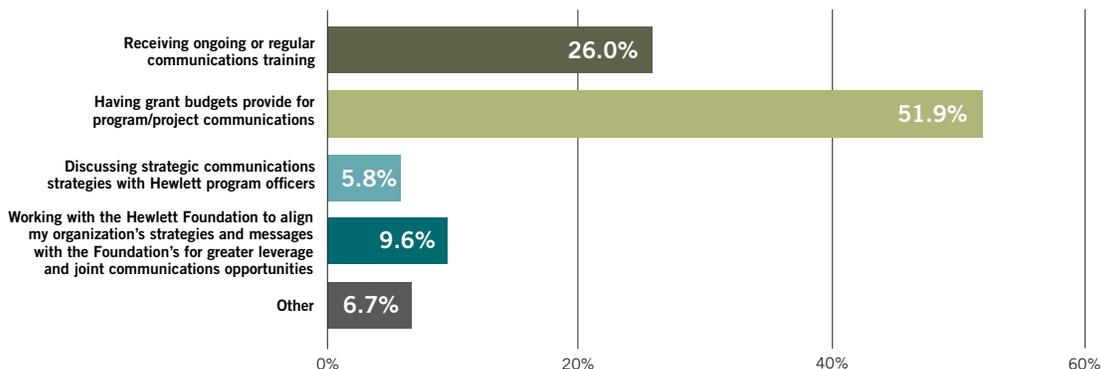
By the time of training, said Caplan, “we had some sense of how we expected our operating model to work, of who our important constituents were, and of which nonprofit segments we aimed to serve, and had begun to speculate about the communications tools that would be most effective.”

Afterward, “It was absolutely clear to me how important communications tools were for SeaChange,” Caplan said. He also began looking to add a staff person “excited about and sophisticated and skillful in communications.” Soon after, the organization hired Jenn Goldstone as a vice president who fit that description. “Training made me open to this skill set sooner than we had expected,” Caplan said, “and others at SeaChange agreed about its importance to our firm.”

With the leadership of Goldstone, SeaChange has generated a set of factsheets about the organization and its affiliates, a newsletter rich with stories, and more. Partners of the organization eagerly anticipate the debut of a new website to replace the modest one used during launch of the organization. “I spoke with a presenter [from training] and talked about our model and our uncertainties about how to use the web,” said Caplan. “He mapped out an approach, and we will be testing out that approach soon.”

Lincoln Caplan attended a 2008 communications training session that was typical of the core program experienced by most participants. His particular session was specifically designed for executive directors of grantee organizations.

IN ADDITION TO THIS ONE-TIME COMMUNICATIONS TRAINING EXPERIENCE, WHICH TYPE OF HEWLETT FOUNDATION SUPPORT FOR COMMUNICATIONS WOULD YOU VALUE MOST?



Assessing Participant Communications

From the 181 Hewlett Foundation-sponsored training participants who completed a survey, 40 were selected for an hour-long phone interview and asked to submit core communications materials, including a recent communications plan, to better gauge both their perceptions of the training experience, as well as their communications capability—and to what extent they attribute that capability to training.

Interview candidates were chosen by Williams Group to represent a diversity of issues addressed (as determined by Hewlett Foundation program areas), participant job functions, and types and years of training received. A few organizations were represented by multiple individuals, interviewed separately, who took part in training as a team.

About interview subjects

40	individuals	26	participated in the most common three-day training sessions created by the Hewlett Foundation in tandem with the Communications Leadership Institute/Spitfire Strategies (6 in 2009, 11 in 2008, 4 in 2007, 5 in 2006).
35	organizations	9	participated in training experiences tailored to a specific interest area (3 in the global development training in 2009, 3 in the community college-related training in 2008, 3 in the California policymakers outreach training in 2007).
7	working in education	5	participated in an intensive executives-only training for several days over the course of a year (1 in 2009, 1 in 2007, 3 in 2006).
4	working in environment		
7	working in global development		
3	working in performing arts		
6	working in philanthropy		
11	working in population		
1	working on special projects		
1	working on regional issues		
18	executive directors		
9	communications/marketing/public relations professionals		
3	program staff		
4	development staff		
6	“other” staff		

Eight Observations

BASED ON INTERVIEWS AND MATERIALS RECEIVED

1. COMMUNICATIONS PLANNING

Too many organizations pursue communications with little or no documentation of communications planning. Although some described training as useful to their communications planning, none of the plans submitted included a completed Smart Chart—the communications planning template used during training.

“We do whatever we can do [relative to communications] in a project area, but there is no overall organizational communications plan.”

“Planning and strategy, target audiences and messaging—these [training topics] were extremely helpful.”

2. TARGET AUDIENCES

Many organizations have a developed sense of their target audiences and approach communications with these audiences in mind. Training content on target audiences was consistently described as highly valuable.

“Based on the audience, we will tweak the updates we provide and change the call to action.”

“The whole idea that you have to... put yourself into the shoes of your key audience members, think about how your message will be received by them and how you can tailor it to be better... Training sharpened our focus on this and helped me develop some real skills.”

3. MESSAGING

While many training participants struggled to share a set of key messages during a phone interview, the communications materials they submitted revealed adequate to strong messages conveying their identities, goals, and activities. A significant focus of training and of the Smart Chart, messaging coursework received very positive reviews.

“I think we’ve gotten a lot of traction with our messaging about _____. We see the field doing this more. Also, _____ seems to be a big topic, a central conversation. Our tagline has been a great messaging tool—we have a theory of change in our tagline.”

“I don’t have a clear sense of [which messages work]. I am not sure our priority areas are working. People tend to latch on to the one they know the most about and they don’t see the full picture.”

“Messaging was [the] most relevant [part of training]. We have a greater appreciation that our messages were far too complex and we needed to simplify and change our language.”

4. MATERIALS

Communications materials submitted ranged widely in purpose and quality. Though some indicated that training’s primary value was improving their skills for creating communications tactics, such as presentations and websites, few organizations with successful communications materials indicated that training was a great influence on materials. Training content on PowerPoint presentation was most highly regarded, though none among those interviewed chose to submit a presentation for assessment.

Those who did link training to improvements in communications materials suggested that training occurred at an opportune time in the development of those materials.

“[Training] on presentations, storytelling, websites, speeches—that was all hugely helpful. [To our surprise, the presenter] put up our old website as a bad example. We took his advice as we were in the midst of redoing our website.”

“Training helped me shape my organization’s presentations. Personally and for my program I took presentations to a new level. This was easy to apply immediately.”

“We were in the middle of a web redesign—a lot of what we learned went into that web redesign.”

5. MEASUREMENT

Measurement practices varied greatly, with some organizations measuring communications effectiveness extensively and others operating primarily through intuition—though many were taking advantage of the availability and ease of common web-enabled measures. Very few of those interviewed believed that training influenced their practice of measurement; many said they do not recall whether measurement was part of training. (The Foundation has acknowledged an interest in continuing to refine this part of the curriculum.)

“For the newsletter and the website, we do the usual analytics and compare the use of them over time.”

“I’m not sure there was a lot in training about measurement. It was more on the strategic side—not much regarding metrics. We may need a part two of communications training that would focus on measurement.”

6. CAPACITY

With some exceptions, organizations said they were somewhat to significantly limited in their communications efforts by inadequate staffing and monetary resources. However, many credited training with giving them a new understanding of the value of communications, which, in turn, led them to increase their communications budget relative to their total budget, hire new communications staff, contract with communications professionals, or all of the above.

“Our major deficit has been [not] having a staff person [to] focus on communication strategy. I push the staff, but there is resistance in terms of scope of work and individual job descriptions.” (executive leader)

“I think that the influence of the training... the tipping point came after I identified a funding source and brought in a consultant to do an internal audit and assessment of our communications and to create the communications plan.”

7. LEADERSHIP BUY-IN AND SUPPORT

With very few exceptions, interview subjects reported that their organizational leaders are highly supportive of communications. Leadership support of communications appears to be a baseline requirement for the application of lessons learned in training; however, unless the leader her- or himself attended training, training participation generally was not linked to changes in leadership behavior relative to communications.

“[Our leaders] support communications. They allocate funds, and also time and energy. I can’t think of any obstacles.”

“Training reinforced that communications is essential, whereas I’d been thinking of it almost as a luxury.” (executive leader)

8. MISSION IMPACT

Most organizations say that communications plays a role in achieving impact. Some partly attribute specific mission-related accomplishments to participation in communications training. In these cases, it appears that training occurred at an opportune time: right before or in the midst of an important transition.

“[Communications] definitely did [play a role in achieving a mission-related objective]. Sometimes on the defense. We’re working to explain what’s going on and what’s at stake, and we’re reframing the issue.”

“I would say [training has affected our impact]. It certainly has given us strategy and tools. It helped us become more effective... keeping messages simple, being visual, questioning cognitive biases, developing communications based on research.”

Tools to Improve Training

The following tools may help foundations enhance the value of training programs by selecting the right participants and enriching follow-up practices with the support of program officers.

Pre-training Readiness Checklist

Program officers may complete this form to help identify grantee organizations and individuals with great potential to benefit from the communications training experience.

Date: _____

Training candidate organization: _____

Individuals likely to participate: _____

Program officer making recommendation: _____

1. POSITIVE TRANSITION

Training participants most likely to find the communications training experience “transformative” are those experiencing or anticipating a significant and positive transition. Is the organization you’re considering sending to training undergoing one or more of the following transitions? If so, please describe in the spaces that follow.

- Yes No Startup organization
- Yes No New leadership: _____
- Yes No New funding: _____
- Yes No New program: _____
- Yes No New major project/campaign: _____
- Yes No Shift in external environment: _____
- Yes No Other transition: _____

2. IMPLEMENTATION CAPABILITY

Following training, participating organizations must have baseline capabilities to apply communications lessons to their strategic and everyday work. What indications do you have that the organization you’re considering sending to training has the infrastructure in place to implement lessons learned?

- Communications budget as a percent of total budget: _____
- Staff dedicated full- or part-time to communications: _____
- Yes No Access to communications resources: _____

3. COMMUNICATIONS CULTURE

Training participants whose organizational leaders are supportive of communications are more likely to apply training lessons with success than those whose leaders are resistant to communications or skeptical of its value. How would you characterize the communications mindset of those leading the organization you’re considering sending to training?

Staff leaders

- Yes No Value communications
- Yes No Open to change
- Yes No Provide sufficient budget support for communications
- Yes No Support communications through their actions

Board members

- Yes No Value communications
- Yes No Open to change
- Yes No Provide sufficient budget support for communications
- Yes No Support communications through their actions

4. TRAINING PARTICIPANTS

Past training participants very much appreciate attending as a team. With two or more individuals to represent the organization, they are better prepared to use training time to work through communications challenges and to bring lessons learned in training back to the organization. Will the following types of individuals be willing and available to participate in communications training together?

- Yes No Executive leader with the authority to create change: _____
- Yes No Staff member with communications responsibility: _____
- Yes No Staff member with communications or program responsibility: _____

Post-training Participant Check-in

Program officers may use this form as part of an ongoing conversation with grantee organizations to promote the continued use and integration of lessons learned following their communications training experience.

Date of training: _____ Three-month check-in: _____ Six-month check-in: _____

Organization trained: _____

Individuals trained: _____

Program officer conducting check-in (note if different from recommending program officer): _____

1. DELIVERABLES FROM THE TRAINING AND TECHNICAL ASSISTANCE HOURS

- Yes No Completed Smart Chart®
 Yes No Completed Communications Plan
 Other: _____

2. COMMUNICATIONS CONNECTED TO PROGRAM STRATEGY

- Yes No The organization's program strategy and results to date show evidence of an integrated communications strategy.

3. COMMUNICATIONS PLANNING DOCUMENTATION

The organization can produce documentation of communications planning that specifies all or most of the following:

- | | |
|--|---|
| <input type="checkbox"/> Yes <input type="checkbox"/> No Goals/objectives | <input type="checkbox"/> Yes <input type="checkbox"/> No Strategies and tactics |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Targeted audiences/segments | <input type="checkbox"/> Yes <input type="checkbox"/> No Staffing and financial resources |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Key messages | <input type="checkbox"/> Yes <input type="checkbox"/> No Indicators/measures of success |

4. COMMUNICATIONS TOOLS

The organization can share examples of training lessons applied to the following communications tools and materials:

Stories

- Yes No Have basic structural elements: protagonist, inciting incident, barriers, resolution
 Yes No Convey value of organization or importance of issue
 Yes No Are emotive and compelling

Website

- Yes No Visually engaging home page
 Yes No Information is clearly organized and navigable
 Yes No Beneficial use of social media, if relevant per communications plan

Key presentation

- Yes No Appropriate in length
 Yes No Presenter is skilled and passionate (if possible to ascertain)
 Yes No Presenter is prepared (rehearsal)
 Yes No Involves audience interaction (if possible)
 Yes No Highly visual, with minimal text on slide
 Yes No Ends with a conclusion, not Q&A

Other communications tools:

- _____
 Yes No Connected to mission/program strategy
 Yes No Clear and concise
 Yes No Consistent brand
 Yes No Compelling content
 Yes No Audience oriented
 Yes No Call to action
 Yes No Quality implementation
 Yes No Measured effectiveness
 Yes No Valued by leadership

5. USE OF TRAINING FOLLOW-UP MECHANISMS

- Yes No Webinar (if yes, number of participants): _____
 Yes No Technical assistance (if yes, what type and to what effect): _____

6. OBSTACLES TO USING TRAINING

Suggest means of overcoming any obstacles to applying lessons learned in training.

- Time and resource constraints: _____
Participant's influence on organization insufficient: _____
Internal organizational issues: _____
External environment shifts: _____
Other: _____



WHAT NONPROFITS SAY A STUDY ON THE EFFECTIVENESS OF COMMUNICATIONS TRAINING MARCH 2011

Find complete study results at whatnonprofitssay.org.



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