



The Annie E. Casey Foundation

CHALLENGE

Build support for your investment in nonprofit talent and leadership development in a way that might encourage other funders to join you sooner rather than later.

APPROACH

Instead of waiting years until the work is done, create a case study, produce videos, and build buzz early in the game to show the work in process, highlight the contributions of partners, and showcase the lessons you're learning along the way.

OUTCOME

Casey has documented the earliest lessons learned in a multi-year project, setting the stage for more. The case study and videos produced for this projects have been widely circulated by the foundation and its grantee partners.

Tell the Story of Your Investment as it Unfolds

BUCK TRADITION AND BREAK THE SILENCE

Traditionally, when a foundation invests in a project, it lets that project mature over time, and then releases its take on the work (usually in the form of a report or lessons learned document) many years later. But that approach didn't sit well with former Annie E. Casey Foundation Program Director Rafael López. As he considered the investments Casey was making to support a partnership between Management Leadership for Tomorrow (MLT) and New York University's Stern School of Business and Wagner Graduate School of Public Service to prepare new leaders of color for the nonprofit sector, he wanted to try something different.

"We wanted to try and model a different style of active learning and reporting out to the field," says López. "We needed to learn from earlier observations about our work. So one objective was to capture lessons learned early on. Another objective was to showcase the incredible work done by our partners. They had built a relationship with us that was important and unique, and communication & collaboration were key, and I wanted to communicate this to the field."

"Kris and her team were an excellent choice to help us convey some early 'wins' so our partners could energize their own networks and groups to ultimately fund this project."

- RAFAEL LÓPEZ, FORMER ASSOCIATE DIRECTOR, THE ANNIE E. CASEY FOUNDATION

CREATE A STORY THAT RESONATES

The Putnam team dove into the story as it unfolded, conducting multiple interviews with leaders from MLT and NYU to uncover each partner's perspective on the work in progress. They also suggested highlighting a project participant, Corey Blay, who was the first student in a pilot joint MBA/MPA program that was part of the larger MLT approach to social sector leadership development. Corey's story gave a "real life" narrative to a complex partnership, illustrating the ultimate reason why Casey made its investment.

"Kris and her team were an excellent choice to help us communicate all the work, to weave together all the strands, and also to convey some of the early 'wins' so the

project could be used by our partners in their own networks & groups, so they could be energized and engaged by the work, and ultimately fund it," says López.

But a written case study about MLT was only part of the story, and López also relied on Putnam's social media savvy to spread the word. "Traditionally, philanthropy is about written projects, and I wanted to change the way of communicating in a more media-savvy and media-friendly way, to give a voice to these people using video, tweets and blog posts," he says. Putnam captured Corey's experience on video, as well as the perspective of NYU Wagner Dean Ellen Schall.

BUILD SUPPORT WITH SOCIAL MEDIA

Once the case study and videos were complete, Putnam disseminated information and links to its 15,000+-follower network. It also "packaged" the information into ready-to-go news stories and email blasts for use by other grantmaker networks and media outlets. Casey and its grantee partners disseminated to their networks as well. As a result, Casey shared the story of its emerging project with tens of thousands of readers and viewers — some of whom may be inspired to co-invest.



Putnam Consulting Group

Confident Giving • Dramatic Return

Putnam Consulting Group is a national, award-winning, philanthropy consulting firm. Since 1999, we've been honored to deliver results for foundations of all sizes and types. From developing powerful initiatives, to evaluating impact, to sharing the story of your success, we provide experienced consultation and guidance, logistics support and communications savvy to any or all of your grantmaking team or foundation leadership.

WHY PUTNAM?

Simply put, Putnam provides a full range of expertise and services to help philanthropic organizations achieve dramatic results with confidence and clarity. With our assistance, foundations and nonprofits visualize, design, implement, evaluate and share programs and ideas effectively and in ways that inspire.

Since our inception, we've worked with more than 50 foundations on more than 100 projects specifically designed to increase their impact and deliver dramatic results. Our clients include leading national foundations and smaller regional and local foundations that want to improve their practice and make a deeper difference in the communities they serve.

We don't just rely on ourselves. Instead, we spend time getting to know your organization, your values, your stakeholders and

your environment — in depth. And we seek the perspectives and opinions of and engage discussions among those who influence your success, from internal staff to external partners.

Our nimble, flexible approach means your project receives the constant attention and specialized expertise it deserves — every time.

"Kris Putnam-Walkerly knows the philanthropy field, has the relationships, and understands the behavior and culture of philanthropic foundations."

— COLIN LACON, PRESIDENT & CEO,
NORTHERN CALIFORNIA GRANTMAKERS

OUR LEADERSHIP



Kris Putnam-Walkerly is a recognized leader in philanthropic program design, implementation, evaluation and communication. She specializes in helping foundations embrace new and more effective

approaches to solving social problems. Her focus on actionable solutions and recommendations provide her clients with clear direction for maximum impact.

Kris is a master communicator, and has produced innumerable blogs, articles and essays that deliver meaningful, relevant

insights to the field. She has been quoted in the Washington Post, BusinessWeek and other media outlets. She helps her clients communicate their stories — through her vast network of contacts and Twitter followers — thereby enriching the collective wisdom in philanthropy.

Kris chairs the steering committee of the National Network of Consultants to Grantmakers, serves on the board of the Community Foundation of Lorain County and the advisory committee of the Foundation Center in Cleveland, and is a member of the Society for Advancement of Consulting.

LET US HELP YOU

DEVELOP INNOVATIVE PROGRAMS

- Design grantmaking strategies and new funding initiatives
- Conduct environmental scans
- Create theories of change
- Engage stakeholders
- Pinpoint funding gaps
- Identify funding partners
- Incorporate best practices

ALLOCATE FUNDS WISELY

- Develop and manage the RFP process
- Identify and support intermediary organizations
- Train internal program leaders
- Manage and implement grant programs

EVALUATE IMPACT

- Assess evaluation needs
- Determine evaluation readiness
- Incorporate qualitative and quantitative measurement
- Conduct evaluations
- Translate evaluation results into clear recommendations

COMMUNICATE RESULTS

- Craft compelling case studies
- Build toolkits to support your issue
- Share lessons learned
- Circulate articles for newsletters or national press
- Produce videos that tell your story
- Present at board meetings or national conferences
- Post on various social media outlets
- Record podcasts
- Post blogs to increase exposure