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Get Out of Your Bubble and Into Your Community

by Kris Putnam-Walkerly, MSW

"Solving intractable problems requires that funders have a true understanding of the issue, a range of partners to join in the work, and an ability to continually learn from collective actions and apply that learning to ongoing efforts. None of these three things is possible if funders don't dive deeply into issues or get out into their communities, face-to-face, on a regular basis."

Effective grantmaking rarely happens if grantmakers spend all their time behind a desk. True, people in the community may find their way to a foundation office, hat in hand, to make a pitch for their organization or cause. And funders sitting behind a desk and listening to the pitch may decide to offer it up to their boards, who may in turn make a grant. But in this scenario, no one really comes out ahead. The grantseeker and funder have built no relationship with or trust in one another. The funder has only a vague understanding of the organization, its strengths and weaknesses, and the need it addresses. Therefore, both funder and grantee have likely missed opportunities to be more knowledgeable and effective, and lasting change is rarely, if ever, made.

There are many reasons funders choose to stay in their bubbles. For some, grantmaking is only one of many occupations, and there simply isn't enough time to do more than respond to requests. Others fear that by appearing too willing to learn or by making themselves too available, they'll end up overwhelmed with requests. Others may work physically far away from the places they serve, such as a U.S.-based funder who supports organizations in Africa or the Middle East. Others simply don't like the discomfort of saying "no" in person to grantseekers.

When funders behave in this way, they aren't intentionally undermining their own effectiveness, but they are deluding themselves that they're achieving the impact they'd like to see. It's one

of many manifestations of what I call *delusional altruism*[SM], which occurs when funders genuinely try to be altruistic and make a difference in the communities they serve — but pay absolutely no attention to how they hinder themselves through operational inefficiency and waste, lack of investment in human and financial capital, and, yes, staying safely inside their comfort zones.

When funders don't make an effort to deeply understand their communities, they are deluding themselves.

This paper explores the reasons why breaking out of a funder "bubble" is so important and how funders can engage more deeply with their communities.

7 Reasons to Break Out of the Bubble

Solving intractable problems requires that funders have a true understanding of the issue, a range of partners to join in the work, and an ability to continually learn from collective actions and apply that learning to ongoing efforts. None of these three things is possible if funders don't dive deeply into issues or get out into their communities, face-to-face, on a regular basis.

What happens when you break out of the bubble?

1. **You learn more than if you'd stayed in the office.** Imagine a program officer who wants to know about the issues facing the elderly in his community. He requests and receives reams of data about illness and injuries, clinical services, nutrition, and mobility. But he doesn't get out and talk to those who serve the elderly one-on-one, or the elderly themselves, so he misses the key importance of human contact. He misses both the life-sustaining compassion that caregivers provide and the instances in which caregivers unintentionally (or sometimes purposefully) contribute to elder abuse. He only sees data, and he misses some very real points of impact. He doesn't see the camaraderie among the leaders and staff of elder-serving organizations and therefore does not recognize energy and relationships that might become strong partnerships. And he misses the "ah-ha"

moments of deep understanding that can come when one sees how local, state, or national policies play out on the ground. (You could easily apply this example to any field or issue.)

2. **You identify new needs and opportunities.** Too often, funders are not aware of needs in the community that may align with their missions. Nonprofits haven't seen a connection between the funder's mission or published guidelines and their own work — and the funder hasn't asked, so the nonprofits haven't shared. But strong communities are built on deep, multifaceted, and intertwined interests. When you get out of your office and engage in conversations with grantees and others in the community (even by phone or Skype, if you can't get there in person), you're more likely to discover new ways in which your funds can make a difference.

3. **You become a better connector.** Many of your community's nonprofits, government agencies, and other funders likely work in silos. When you get out into the community, you begin to see where their work might overlap and where there are gaps that can be filled. The more people you meet and the more organizations and projects you learn about, the more likely you are to discover unmet needs and to build the connections that can address them. This is true even if the "community" you serve is global. You may not be able to be physically present in every place your grant dollars touch, but you can make connections at conferences, introduce people who are working on similar projects in different parts of the world, and openly share research and learning with everyone.

4. **You build trusting relationships.** Foundations can't affect community change by themselves. They must have grantees and partners who are willing to work alongside them. That requires trust — and trust is earned through personal interactions and relationships that can't be built from behind a desk.

Trusting community relationships are key to moving work forward, but they're also incredibly valuable in times of crisis. When people know and trust your organization, they are more likely

to include you in addressing a community event, such as a natural disaster or civil emergency. Consider the example of the Greater Cincinnati Foundation. When race-related protests surged in the city in 2001, the foundation was surprised that no one approached them to play a role in addressing the issue. The community either didn't know or didn't trust the foundation's abilities as an influential asset. Fortunately, the foundation had the wisdom to proactively reach out, engage, and build trust with other community organizations, ultimately playing a role in redefining community policing in Cincinnati.

5. **You can engage your board and staff more deeply.** Board and staff who have a firsthand understanding of the impact of their work also have a greater enthusiasm. If you know what's going on in your community, who's doing exciting work and who's leading on important issues, you can help your team make those connections as well. Get trustees and staff members — not just program staff but all staff — out on site visits, send them to community meetings to listen, encourage them to volunteer. The St. Luke's Foundation in Cleveland regularly conducts site visits with grant applicants every quarter, and all board and staff members are expected to participate in at least a few. This makes for a great deal of organization and management for staff, and it may be too much for many funders to embrace, but it guarantees that board and staff develop a deeper and more personal understanding of the issues, needs, and assets that will influence the foundation's grantmaking success.

6. **You and your team become better stewards of community resources.** When your founding donors or current donors made their gifts, they put their trust in you and your colleagues to make the best choices to achieve their charitable intent. If you aren't deeply knowledgeable about the issues you seek to address and the current situation(s) in the community or communities you fund, and you don't continually learn and improve by getting out there, what value are you providing to those donors?

For that matter, what value are you providing to grantees? In its 2010 report "Working with Grantees," the Center for Effective Philanthropy noted that, "When grantees sense that foundation staff do not have knowledge relevant to the communities in which they work, they express their concerns — frequently describing a worry that opportunities for impact are being squandered." Increasing your understanding of the issues, including the places affected by them and the players who are working to address them, will help you become a wiser steward and a more effective partner.

7. **You increase your effectiveness and your ability to meet your mission.** Developing a deep, firsthand understanding of your issue and community will allow you to achieve your ultimate philanthropic goals. It also will help you better use all your philanthropic tools — not just funding but also convening, information sharing, connecting, providing leadership, and advocacy — to support the work of the organizations that address the causes most important to you.

As you can see, there are many reasons to break out of your bubble and engage more deeply in learning about the issues you address and the places you serve, whether that's a single county or multiple communities around the globe. In fact, there's no good reason not to. (There may be excuses, but no good reasons.) So, how do you go about it?

Getting Started

Becoming a Learning Organization
Breaking free of the bubble begins with a commitment to truly becoming a learning organization. Many funders claim they want to learn, but few take the time to define what that means and commit to an intentional learning agenda. Staff and board members may have made individual strides but have no means or impetus to formally share their learning with others.

Intentional learners:
- o Commit to learning as a part of their goals and day-to-day duties.
- o Document and share what they learn.
- o Discuss what they learn with their entire team.
- o Use what they've learned to make decisions.

o   Apply what they've learned to their ongoing work.

In addition, it pays to remember that learning should always be a two-way street. You can't expect others to open up and be honest with you if you aren't also forthcoming and open in sharing with them. This doesn't mean you need to air dirty laundry, but it does mean you should be clear that you don't have all the answers, be honest about where you have questions, and be open where you'd like to improve your own knowledge or capacity.

With your "intentional learner hat" now firmly in place, there are many ways to go forth and learn in your community. One of the best ways to do this is to engage in "scanning." My esteemed colleagues at GrantCraft, in their guide "Scanning the Landscape 2.0: Finding Out What's Going On In Your Field," define scanning this way:

> *When you want to do more than "just make good grants," you may find it necessary to look carefully across the field for targets of opportunity — places where your support could be especially influential, where your resources could help develop a new direction or innovation, or where you might be able to join forces or align your work with others in order to accomplish something bigger than you could do alone. Finding those opportunities and understanding how a given field works are what we mean by "scanning the landscape."*

11 Techniques for Scanning the Field and Your Community

1. **Ask yourself, "What do we want to learn?"**
    What do you need to know to meet the goals of your current strategic plan(s) or initiative(s)? What are the hurdles to success that are keeping you up at night? It may seem like a simple question, but asking your team to consider what you'd like to collectively learn will help identify areas in which your current thinking is already aligned or could be better aligned. It will help you realize where you have some knowledge and where critical gaps in knowledge are holding you back. It will also help you understand which kinds of learning will be particularly suited to bubble-breaking activities.

2. **Start with yourself.** You may be surprised at the amount of information already contained in your own data and in the minds of your staff and board. You'll need to mine those sources before you head out into the community, so that you don't spend time learning what's already known, or missing opportunities to dive deeper into what you have.

    Then ask your staff and board to think beyond your own walls. Have them think of three people whom they consider to be experts on your issue. These could be national experts, a grantee, or another funder, just to name a few possibilities. Also ask them to list three reports that they'd like to study, such as your United Way's most recent community needs assessment, a statewide report on child poverty, or a series of articles in the national press about the growing opioid crisis. For each of these resources, have them identify three key questions they'd like to ask or points of information they'd like to find. Use their input to develop an initial internal learning plan for your organization that includes everyone's sources and questions, a concrete time line, and assignments for working that plan. Be sure to include time for everyone to share what they learn!

    Tapping into the wisdom and knowledge of national experts can be a physical bubble-busting exercise. Years ago, when I helped the Charles and Helen Schwab Foundation plan new initiatives to prevent poverty and address homelessness, I took the national program director with me across the country to meet with top national thinkers and leaders in New York and Washington, D.C. As a result, we deepened our understanding of best practices and strategies, and we received some very personal and sage advice.

3. **Protect your learning time.** Once you know what you want to learn, and what knowledge you currently have to build upon, establish some protected time for community learning. Depending on your situation, it could be a few hours a week of dedicated learning time per person, or several days or weeks per quarter or year. If you're starting or improving upon a grantmaking initiative, you may wish to

protect the first few weeks or months of work as dedicated learning time within your community.

4. **Look for organic learning opportunities.** As you venture into your community, remember that external learning doesn't have to be complex, and that organic learning — those casual conversations or happenstance opportunities — build both trust and knowledge. Start simple: Take a policymaker, local government agency head, or key nonprofit leader to lunch. Take a walk through different parts of your community and learn by observing the activity around you, noting the institutions that are present, and chatting with the people whose paths cross yours.

5. **Leverage existing networks and resources.** There are probably countless networks currently active locally, nationally, or even globally that can inform your learning. These might be networks of organizations fighting homelessness and hunger, supporting and improving public education, preventing violence, protecting the environment, improving organizational capacity, or conducting a host of other work. They include a plethora of issue-focused funder networks such as Grantmakers in Health, Grantmakers in Education, or the International Women's Funding Network; more place-based funder associations like Philanthropy Ohio or Southeastern Council of Foundations; and global associations such as the European Foundation Center or WINGS. Within these networks, there are likely others who share the same learning questions that your organization has defined. Wouldn't it be better to learn about those questions together? As the saying goes, "all of us are smarter than any one of us." Join those networks and watch your learning expand.

Likewise, use the resources of other organizations to inform your learning. Ask for reports and assessments they may have produced and ask them to explain the most significant findings to you. If those reports, assessments, or other resources don't exist, consider working with other learning partners in your community to create them.

6. **Tap into the power of site visits**. Some funders think of site visits as a time-consuming stewardship obligation. Others have never conducted as site visit. Yet spending time with the people who serve your community — on-site where the work is being accomplished and where you can meet those whose lives are being changed — is one powerful learning opportunity. Site visits can provide reams of information that you've asked for, as well as insights that you might never have imagined. There's no substitute for seeing an organization in action to determine what's working well and what could be improved. One funder told me the story of visiting a grantee that mostly served communities of color but was led by a white CEO. During the site visit, the funder watched as the CEO talked over his staff of color, dismissed many of their ideas, and generally dominated the conversation. This revealed more about the organization's needs and effectiveness than any report it might have generated.

As I mentioned above, make site visits a whole-foundation affair. Bring representatives from both your board and your staff — and not just program staff, but financial, operations, investment, and other functions. They'll each bring a different perspective and different questions to the work. For example, if a finance manager is frustrated by grantee's reluctance to use an Excel template, a site visit might reveal the cause in some very real challenges for the grantee, such as inexperience with financial terms, English as a second or third language, or lack of time in the face of many competing demands and crises. Such site visits might engender more compassion and empathy among the funder's staff and board members.

Site visits don't have to be limited to grantees. When I consulted with The Cleveland Foundation to help create a new youth development initiative, I organized a series of site visits to other cities to learn from their own work on the issue. Our group, which included the foundation program officer and five local leaders who were involved in planning the initiative, visited similar youth development initiatives in Indianapolis, Philadelphia,

Baltimore, and Providence. Our group not only learned together but also bonded more deeply and became true champions of the work.

7. **Learn together.** Learning with others is much more enlightening — and more fun — than learning on your own. Funders who recognize a role as co-learners in a community enjoy greater insights, openness, and trust than those who prefer to learn alone. Learning with others is especially important if you're considering a new funding initiative and/or want to better understand a population or issue where you're not making the impact you'd like to see.

As a board member of the Community Foundation of Lorain County, Ohio, I was part of an 18-month learning process to study diversity, equity, and inclusion within our own walls. Although our focus was internal, our learning was broader, including our board, staff, affiliate fund leaders, and community stakeholders. Together, we all participated in an intense process to better understand ourselves and our community, and we collectively came up with recommended changes for foundation policy and practice.

On a broader scale, when the federal Children's Health Insurance Program (CHIP) program was introduced in California, the David and Lucile Packard Foundation regularly traveled to convene with four California counties to learn jointly about best practices for enrolling families in low-cost children's health insurance. These face-to-face meetings brought in experts and other funders to learn together, allowing everyone to share successes and challenges in real time.

8. **Collect data together.** A key part of learning with your community may be collecting data, and the more diverse and far-reaching your community learning partners, the better your data is likely to be. As a funder, you can use traditional methods — like surveys, focus groups, and interviews — to pose questions to the community. But you're not likely to reach beyond your cadre of "usual suspects" for the full range of perspectives and observations. One of the best nontraditional data collection

efforts I've witnessed was part of The Cleveland Foundation's MyCom youth development initiative. The local university evaluation partner trained a group of youth participants to be evaluators. The youth learned what evaluation is, designed data collection surveys, collected and analyzed the data, and made recommendations for improving the initiative. This kind of data collection directly engaged the beneficiaries of the program and harnessed insight and analysis that only they could bring to the table.

By learning in partnership with others, you gain their insights not only into what kind of data you should collect and what questions to ask but also into where you should be collecting data and how. Community learning partners can give you authentic access to parts of the community where you may not yet have established trust. They can also help you develop nontraditional questions and tools that can provide richer results.

9. **Disaggregate the data you collect.** Data in the aggregate can give you a broad-brush understanding of overall trends in your community, but it can't tell you what's happening on the ground. When you disaggregate data according to race, gender, income level, zip codes, or other factors, you're likely to see a much clearer picture of where needs and opportunities are present, and how and why investments may or may not be delivering the change you'd like to see. The Annie E. Casey Foundation demonstrated the power of such data in 2014, when it first released results from its annual Kids Count report disaggregated by race. The differences in outcomes for children of color showed up in stark contrast to the aggregate numbers, sparking discussion about and attention to more equitable solutions.

10. **Involve people who are different from you and bring diverse perspectives.** Diversity is important because it brings new ideas, knowledge, and expertise to your work. In this case, diversity could include not just people of different races, ethnicities, genders, or sexual orientations but also those diverse in age, income, neighborhood, and life experience.

Internally, be sure to include people from different departments in your organization, those with different job titles and responsibilities, and those who are new to your work as well as those who've been around for some time. In addition to tapping many different minds to help your foundation better understand the issues at play in your community, you'll also be able to help your diverse group better understand your mission, values, and vision.

11. **Eliminate "us vs. them."** While reaching out to diverse community members in your organization as you break through your bubble, consider making that learning an ongoing part of your institution by bringing them in on a more permanent basis — as staff, board, or advisory members. Making your foundation more inclusive also makes it more of a learning organization. For example, when I was on the board of the Community Foundation of Lorain County, my colleagues were mostly suburbanites like me. But the county is largely rural. When a local farmer joined our ranks, he opened our eyes to the issues facing his peers and ways the foundation might engage. Eventually, we drew on his knowledge, relationships, and connections to create a "Gifts of Grain" fund at the community foundation that allowed farmers to donate agricultural commodities such as corn, wheat, and soybeans. That's knowledge and an outcome we'd never have achieved had we not sought diverse perspectives.

When Bubble Bursting Goes Awry

There are ways that a funder's bubble bursting can cause problems — for the funder, the community, or both. It's reasonable to expect that your venture into the community may create more work for you and take some time from those from whom you wish to learn, but there are other downsides that I've seen funders stumble into as they eagerly embrace the idea of getting out into community. Here are the five most common:

1. **Overemphasizing the use of evidence-based practice or replicating "best practices."** "Evidence-based practice" is rapidly becoming a buzzword in philanthropy. It's understandable, because we all want to know that the programs

YOU DON'T HAVE TO GO IT ALONE

All the bubble-bursting suggestions in this document likely can be done by you, your staff and your trustees — at least in theory. But sometimes you may need outside help. For example:

- You may not have the expertise needed to get started, or you simply need help navigating a course forward.
- You may need help cultivating some key relationships, or repairing damaged ones.
- You simply may not have time to do all you wish to do.
- Some topics of learning, such as race relations, equitable economic development, or public education, may put your community on edge.
- You might be concerned that you won't get honest information from potential partners or grantees, so you need an objective third party to facilitate interactions or conduct research on your behalf.
- You may desire additional credibility, such as that of a well-known consulting firm or a university.

Fortunately, there are many people who can help you. For example, good consultant can intentionally make time to focus on your project, knows how to conduct meaningful interviews and surveys, brings subject matter expertise, and has relationships to draw upon on your behalf. A university researcher can help you access and synthesize data from a variety of sources or design, collect, and analyze a customized data set specifically for your work. A trusted advisor can provide backstage coaching to help you navigate your scanning efforts and make sense of your findings. The trick is to find the person whose expertise is most closely aligned with your needs and community.

and approaches in which we invest are absolutely going to work. The problem is, it's unreasonable to assume that what's proven to work in one population or geography can work exactly the same way in another. In fact, if you look at researchers' descriptions of evidence-based practices, you'll see how very narrow the target populations and intervention approaches are. Remember that your community is unique, and that grantees often don't have the motivation or capacity to apply an off-the-shelf evidence-based practice or best practice to a

problem. They may be willing to explore it with you, but you'll need to account for the local policy environment, needs, culture, strengths, capacity, and talent when considering the efficacy of an evidence-based solution.

2. **Jumping on bandwagons and chasing shiny objects**. We've all been there: A new, incredibly promising theory or practice is everywhere we look, receiving rave reviews for its importance or impact. We ask ourselves, "Shouldn't we be doing this?" I remember when "collective impact" was emerging as the next great approach to community problem solving. One foundation CEO whom I knew was eager find a community-wide problem for which he could apply the collective impact model (rather than scanning for an unmet need and then determining the best, most efficient way to tackle it). Other bandwagons that may sound familiar are the ice-bucket challenge and crowdsourcing for new ideas. This is not to say that new approaches aren't worth exploring, but they must make sense in the context of your mission and your community's vision, assets, and capacity.

3. **Not sharing what you've learned**. Nothing is as counterproductive — or as downright rude — as reaching out to your community to learn and then keeping all the information you gather to yourself. Even if what you learn dissuades you from pursuing an issue further or from funding in a particular area, other people are still hard at work on those issues and areas, and what you've learned can be of value to them. Never forget that as a funder, your knowledge (whether gleaned from research, from co-learning, or from mistakes made and lessons learned) is a valuable community asset. On the other hand, asking people to work with you and share their time and knowledge to help you learn without giving them access to the end result is rather like asking Cinderella to help prepare all the finest garments and then telling her she can't go to the ball.

4. **Subjecting yourself, and others, to information overload.** Some foundations break out of the bubble with a vengeance, eager to learn anything and everything about their community, an issue, or potential solutions.

They gather reams of data, collect piles of reports, and record conversations with everyone in town. Sure, they're being thorough, but they're also being the Energizer Bunny of learning by continually going, and going, and going. They generate more information than anyone can realistically process or use, and as a result they create a swamp of knowledge that can actually stop decision making and progress in their tracks. When you have what you need to plan — and especially when you start hearing the same thing over and over again — you can stop gathering information and start using it to move forward.

5. **Not hearing from the people who matter most.** In this case, I'm referring to those who will be most affected by the need you seek to address or the methods you'll use to address it. For example, if you want to put an end to homelessness, be sure to talk to homeless people and those on the front lines of serving them. If you want to build stronger communities of color, be sure residents of those communities are a part of your learning team. And if you want to help youth develop into successful and happy adults, then build connections and relationships with youth through your learning agenda. You'll also need to realize that different groups or individuals in your learning efforts will likely provide the best information if questions are tailored specifically to their perspectives. In other words, throw the generic interview guide out the door and think about whom you're talking to and what unique perspectives they can share.

The good news is that all these situations are avoidable if you have a clear idea of what you're doing and why. Your plan for intentional learning is a great tool for steering clear of these pitfalls and other challenges and barriers that can arise when you seek to break the bubble.

Challenges and Barriers to Breaking the Bubble

What keeps funders from being as successful as they could be when it comes to breaking out of the bubble and into the community? Usually it's not barriers that

arise from the community but those that the funder puts in its own way. Here are four common challenges:

1. **A poverty mentality vs. an abundance mentality.** Some funders believe that investing the time and money necessary for their own learning is self-indulgent or extravagant. Every penny, they argue, should go directly to grantees. But I would counter by pointing out that investing in one's knowledge and relationships does far more to increase effectiveness and impact than simply writing checks.

2. **Fear.** Getting out there can be horribly intimidating. It's natural to feel some anxiety. What if you hear what you don't want to hear? What if the conversations become uncomfortable? What if people expect that you'll be following up with a grant? These fears are understandable, but they're also manageable. Different perspectives on, or even criticisms of, your work may be hard to hear sometimes, but in hearing them you begin to improve your effectiveness. And managing the expectations of others is as simple as being clear from the start about why you're on a learning journey and what you intend to do next.

3. **The power dynamic**. Several people have joked that once you begin work at a foundation, you're instantly smarter, funnier, and more attractive than you were the day before. But savvy philanthropists understand that the wealth they represent can create an uneven power dynamic, and that they may be told what people think they want to hear. In the short term, it may be wise to bring in an outside consultant who is better able to obtain honest answers and hard truths. Over the long term, you'll want to focus on building trusting relationships with grantees that allow them to share challenges and feedback without fear of reprisal.

4. **Keeping next steps a mystery.** When it comes to doing something with the information they've learned from the community, many funders forget to explain or discuss next steps with their community learning partners. Maintain open lines of communication with grantees and community members. It's OK to say that you're not yet sure about what you'll do next, and that you'll need time to sort things out. But remember that you'll want to maintain the relationships you've built so that when you are ready to act, the community is ready to step up with you — and

that means regular communication, such as periodic updates about your decisions and plans.

How can you avoid these barriers and challenges? I recommend adopting the following four values for your journey beyond the bubble:

1. **Speed** – Move not with carelessness but at a pace that is both challenging and invigorating enough to keep everyone interested and engaged, internally and externally.
2. **Honesty** – Be clear that you don't have all the answers and are seeking partners to learn with you.
3. **Transparency** – Be open about what you intend to do with what you learn, and why, and what your community can expect from you as a result (even if it means saying that you haven't quite figured all that out yet).
4. **Abundance** – Recognize that your learning is an investment that will deliver considerable return, and invest time and resources accordingly.

Make It Permanent

Once you break beyond your bubble, it's almost impossible to go back. But that's OK, because you won't want to. You'll want to incorporate community engagement and continuous learning into your everyday, ongoing work. Engaging with your community in intentional learning is incredibly habit forming, and fortunately it's a habit you can easily maintain. Plan for a few simple, ongoing activities, like taking a city council member to lunch once a month, or convening a group of grantees once a quarter, or publishing new reports and data every year. You can also make community learning part of your staff's work plans and even have them create their own individual learning agendas, for which you'll hold them accountable. Be sure to make time in staff and board meetings to share and discuss what you're learning, how it might apply to your work, and what you plan to learn next. And finally, document your learnings and share them internally and externally.

As human beings, we are hardwired to learn. It's in our nature. And as we begin to learn more about and with our communities, apply what we've learned to new solutions, and share what we've learned with others, we'll begin to see deep and lasting changes in our communities and our world.

Putnam Consulting Group is an award-winning global philanthropy consultancy. Since 1999, we've helped foundations, corporations and philanthropists strategically allocate more than $400 million in grants and gifts to increase impact, share success, and advance mission. We provide experienced advising, strategy development, and communications savvy to help foundation leaders and individual philanthropists engage in transformational giving.

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"The Putnam team stands out because they always take the time to really understand what we need, and they maintain their objectivity to make sound recommendations. I highly recommend them."
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"Kris is great at making the complex easy to understand, and helps grantmakers shift their thinking to embrace new possibilities and opportunities. Her presentations to our board were engaging, informative and inspiring, and have set us all on a clearer path toward effectiveness."
— LaTida Smith, President, Moses Taylor Foundation

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The California Endowment	Robert Wood Johnson Foundation
Winthrop Rockefeller Foundation	The Stuart Foundation
California HealthCare Foundation	Walton Family Foundation

KRIS PUTNAM-WALKERLY

- A globally recognized philanthropic expert and advisor, named one of America's Top 25 Philanthropy Speakers in 2016 and 2017

- Author of *Confident Giving: Sage Advice for Funders,* named a Top 10 Corporate Social Responsibility Book in 2016 and a finalist for the 2017 International Book Awards

- Forbes.com contributor, and quoted in the Wall Street Journal, Washington Post, BusinessWeek and other media outlets

- Co-editor of the first edition of *The Foundation Review* dedicated to the field of philanthropic consulting

- Author of the highly acclaimed *Philanthropy 411* blog, *Smart Philanthropy*[SM] podcasts, and *Confident Giving*® newsletter

- More than 70,000 followers on social media

- Former trustee of the Community Foundation of Lorain County and Horizons Foundation

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➤ Immediately put new skills and ideas into action with tailored, post-speaking training sessions for staff or board

STRATEGIC CONSULTING

➤ Conduct strategic planning

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➤ Conduct environmental scans

➤ Identify funding partners and intermediary organizations

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➤ Craft compelling case studies

➤ Build toolkits to support your issue

➤ Share lessons learned

➤ Disseminate your story via our broad network of press and social media