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8 Game-Changing Tactics for Effective Giving (Because the World Won't Wait for Your Strategic Plan)

If you're anything like the philanthropists and foundation leaders I've been talking to lately, you've had just about enough of the word pivot.

I can't say I blame you.

Many funders are feeling defeated because their hard-fought five- or 10-year "strategic plan" has been obliterated, thanks to the shape-shifting landscape of this new decade. Others are overwhelmed and anxious about the endless what-ifs of an uncertain future. No one's giving up entirely (especially not you, I suspect), but everyone's worn out—and wishing someone would just tell them the right next move.

Can I tell you something most consultant-types won't admit? Your "next right move" is to ... move.

Here's what I mean: Pondering and planning and preparing is important, but over-strategizing actually slows progress, rather than accelerating it. In fact, part of the reason many philanthropists are so overwhelmed right now is they're expending all sorts of energy, time, and resources trying to plan for the future.

Don't get me wrong; "How do we plan for the future?" is a fair question. But the funders making the biggest impact right now are asking a better one:

How can we make good use of what's right in front of us to do the most good possible?

That's the question we're about to answer.

#1 Change your mindset.

When I talk with funders these days, I can practically see the anxiety coming off them in waves. There's just so much hand-wringing about the "unknown future."

I hate to break it to you, but the future is always unknown. Always.

Yes, the start of this decade has been particularly turbulent, and only time will tell how it'll all shake out. But "only time will tell" is not unique to this moment in history. The future is no more uncertain today than it was a decade ago or a century ago.

So here's the mindset shift I challenge you to make:

Rather than allowing the idea of an "unknown future" to paralyze you, let it free you.

You can't possibly plan for every single contingency, so stop trying to. Instead, decide to be flexible and agile, recognizing your plan will almost certainly have to change along the way.

Said more hopefully, you'll get to change your plan, in response to new opportunities and innovations—from any source at any time. Which brings us to the next point.

#2 Recalibrate your timeline.

If this new decade has taught us anything, it's the futility of spending a year to create a three-, five-, or 10-year strategic plan. While setting long-range goals is great, the reality is we can only plan for the next 12 months or so.

That's good news, though! It means we aren't locked into an inflexible strategy we're just slogging through. Instead, we can quickly incorporate new opportunities into our plan, instead of taking months trying to re-engineer the whole works. In the end, right-sizing our timeline is energizing, because we get to make a bigger impact—faster.

By the way, the idea of recalibrating your timeline applies both to your overall strategy and to your day-to-day activities. For example, no matter what the task in front of you, ask yourself, "How can I get this done faster?" Whether it's writing an email, preparing for your next board meeting, or creating a communication plan for your next virtual gala, force yourself to come up with a solution that requires half the time. Delegate a portion of it, streamline a piece of it, get more efficient at it—or, and this gutsy, simply say "no" to it.

Whatever's in front of you, do it faster.

#3 Don't waste time on data collection.

Gasp! I know, I know: Suggesting data collection is a waste of time goes against everything we've ever been taught about informed decision-making. So please notice I actually did not call data collection a waste of time; I'm only recommending you don't waste time on it.

What typically happens is this: Funders embark on extensive—and expensive—one-off data-gathering exercises that waste a lot of time and money. And then they stop. And then several years later, they do it all again.

For example, I know CEOs who start their planning with “learning tours,” focus groups, listening sessions, and on and on and on. I know boards who engage in relentless benchmarking for the purpose of comparing their foundation's impact to others'. I have a renowned business consultant friend who accuses many philanthropists (accurately) of “planning to start to prepare to get ready for a change.”

The truth is, digging into data is critical—but only to a point. Beyond that point, it's an obstacle at best and a stall tactic induced by a fear of failure at worst.

If you take only one thing away from this list, I hope it's this: You already know far more than you realize. In fact, I'd be willing to bet you know at least 80% of the answer to any question you may have about philanthropy.

I'm guessing you don't believe me, so try this: Sit down by yourself or with your team if you have one, and brainstorm everything you already know about the problem you want to tackle. Invest a couple of hours in this process. It'll be time well-spent, because by the end you'll see the gaps. You'll have discovered the specific information you need to go after.

Base your decisions on the best information you have at the moment, and have confidence you can keep learning along the way.

You do not have to have it all figured out to get started.

#4 Focus on the what before the how.

Far too many philanthropists start building their tactics—the how—before they’ve gotten clarity around their strategy—the what. The truth is, you can’t possibly know how you should do something, before you know what you’re setting out to do!

As you’re thinking about how to make the most impact, start by asking “what” questions:

First, start with “what” questions:

- What do we want to accomplish in the next 12 months?
- What kind of philanthropist, foundation, or corporate giving program do we want to be a year from now?
- What is our objective?
- What is our desired future?

Then ask: Where are we today on this issue? What is our current state?

Only then ask: How do we get from where we are today (current state) to where we want to be (desired state)?

How is a critical question, but it can be a fatal question when asked at the wrong time. If you put the cart before the horse, you force yourself to choose among options before you’ve even identified your objective.

You’ll feel incredibly productive because you’ll be busy doing a lot of stuff, but it probably won’t be the right stuff. So you’ll end up heading down the wrong path—spending time, money, energy, and passion on the wrong tactics.

Teasing apart the what from the how can feel complicated and frustrating. I’ve helped hundreds of funders finally get clear about the problem they want to solve and how to approach it.

I’d love to help you, too.

#5 Identify top priorities and assign accountabilities.

Once you've identified your what, then move to your how. **Simply determine the next three or four most important things that have to happen next to reach your desired future.**

OK, it may not feel “simply,” but since you've asked your questions in the correct order, it'll be much easier than it used to be. Plus, you'll feel more confident that what you're doing will result in a dramatic impact. So, what is the 20% of effort that will drive 80% of your results?

To be clear, these “top priorities” are for your entire enterprise—whether you're a donor-advised fund, a philanthropic organization, or a married couple. These aren't individual-level or even team-level priorities. They're everything to everyone.

For example, if you're starting a new foundation your top priorities might include determining your mission, vision, and values. If your strategy involves reforming the criminal justice system, your top priorities might include disaggregating your grantmaking data by race so that you better understand who you have (and haven't) been funding, hiring a program officer with criminal and racial justice experience, and revamping your funding guidelines.

Now, lean in because this next bit is really important: The success of any plan happens in the implementation phase. Every plan you don't implement will fail. In other words, deciding what to do is only the first part. Then you have to actually do it.

I'll get to that in a moment, but first, once you've determined your priorities:

- Communicate them to everyone. It's impossible to over-communicate your priorities, especially if they're new. Talk about them at every meeting. Put them at the bottom of every internal email. Print t-shirts or reusable cups. Whatever you have to do to keep your priorities front-and-center, do it.
- Determine who will be accountable for making sure each priority happens, and set timeframes.
- Measure progress. Obsessively.

You cannot take your eye off the ball at this point. Why? Because although you've done the tough work of narrowing your priorities, the rest of the world will continue to compete with them. Your old plan will sneak into your email inbox and your calendar. In short, your old priorities will get in wrestling matches with your new ones, and if you're not careful, the old stuff will take over.

Getting serious about the next tip will help ensure that doesn't happen.

#6 Create a roadmap of actions to take—and take them.

Look at every priority, and start listing the five or 10 steps it'll take to get from point A to point B. Then assign people and deadlines to each of those steps, and make sure everyone's in the loop, understands the expectations, and has a clear call to action.

This may feel overwhelming, and so you'll be tempted to spend time making your to-do lists look attractive and fancy. Please don't spend weeks building a Gantt chart. Just make a list and start checking things off. Implement!

For most funders, the very first action step is to release unrelated tasks and commitments.

This isn't easy. You've likely said "yes" to all manner of events, meetings, galas, and more. Chances are, 75% of what's scheduled in the coming months has nothing to do with your new priorities. You need to change that, immediately.

Use this 4-step process to focus your time on what's most important.

1. Print your calendar for the next three to six months.
2. Run every activity through this filter: Will this help me achieve my top priorities? If the answer is "no," circle it.
3. Look at all your circled activities and determine if they're mandatory (e.g., tax audit), a personal priority (e.g., attending your kid's track meet), or whether canceling them might cause more problems than it solves (e.g., dinner with your board chair). If so, mark an X through them. They're keepers.
4. Take what you have left—the circled commitments that won't get you any closer to your established priorities—and eliminate, delegate, or dramatically shorten them.

Now, add your new priorities to your calendar. Literally block out time, even if you aren't sure yet how you'll be investing that time.

#7 Assess and course-correct. Then do that again. And again.

One of the biggest mistakes I see philanthropists make is setting a course, putting their foot on the gas, and never taking their eyes off the road.

Here's what I mean: It's great to have a no-matter-what attitude toward your plan, because that demonstrates passion and commitment. But, as we've already discussed, the future is unknown.

If your plan is rigid, it's tough to pivot (oh, there's that word!).

Your approach must be easily adaptable to create change in a world where disruption and volatility are the status quo.

There is no "new normal," because "normal" never existed.

In other words, stuff happens, and some of that stuff is worth taking your foot off the gas. Sometimes, you've got to pull to the side of the road. And it's best if you do that even before you know you need to.

Practically speaking, you'll need to identify regular intervals (e.g., quarterly or every two months) when you'll check in on your plan and ask yourself some questions:

6 Key Questions to Keep Your Plan on Track

1. What progress have we made?
2. Has anything significantly changed in the external environment (e.g., disaster, election, loss of a key partner) or internally (e.g., staffing changes, influx of funding) that is impacting our progress or that presents an opportunity we should take advantage of?
3. What pieces of our plan should stay the same?
4. What needs to be modified?
5. What should drastically change, if anything?
6. What should be abandoned, if anything?

Then, update your plan, identify top priorities, assign accountabilities, make sure everyone involved understands the changes, and keep going.

#8 Don't let “perfect” be the enemy of progress.

If I were to sum up these tips in one sentence it would be:

Create your plan quickly based on the information you have available, use it immediately and for as long as conditions warrant, and then make changes rapidly as conditions shift.

I know it's tough, because you want everything to be just right. But the moment you think you have all the pieces in place, something will stir them up again, anyway. It's far better to have a great-even-if-it's-not-perfect game plan you can rally your team around—and adjust as conditions change—than it is to be whistling in the wind.

Having a for-now and flexible plan:

- Gives you something to move on. You'll feel like you're finally making progress.
- Allows you to align your efforts and resources toward what you want to accomplish.
- Gives you a framework for making all your day-to-day decisions, big and small.
- Prevents you from being taken off course and pulled in the wrong direction by whatever threats or opportunities present themselves in any given moment.
- Protects you from wasting time and money.

Above all, having a plan prevents the worst course of action: Inaction. Don't wait until your board meeting three months from now to make the decisions the world needs you to make today.



You CAN change the world—even as the world keeps changing.

Just in case no one's told you lately, I want you to hear this: You're incredible. Truly.

It's exhausting trying to improve people's lives when the hits just keep coming. It's frustrating trying to communicate a message of hope in an atmosphere of division and mud-slinging. It's discouraging to think about just how much more needs to be done to create a better world for everyone.

And yet here you are, trying to figure out how to keep going. **We're so lucky to have you.**

The work you're doing is too important to put off or get wrong. Now, more than ever, we need what you bring to the table. The planet's waiting for you to up your game and make your giving as powerful as it can be. I'd be honored to help you do just that.

About Kris Putnam-Walkerly

I understand the tremendous opportunity you have to create change—and also how overwhelming it can feel to navigate it. You have more control than you realize!

My goal is to help you gain the clarity you need to make the greatest impact, no matter the circumstances. In fact, I've spent the last 25 years helping thousands of philanthropists do just that.

Make the impact you want.

Here's how we'll start:

1. **Let's talk.** I can't wait to hear about your work! You can reach me via email at kris@putnam-consulting.com or via phone at 800-598-2102 x1. If you prefer to schedule a phone or Zoom call, you can book it at putnam-consulting.com/schedulecallwithkris
2. **Get a clear path forward.** I'll offer confidential, tailored guidance so you can navigate every challenge with clarity—and have fun doing it, too!
3. **Achieve dramatic impact.** You have what it takes, and the world needs you!

Kris Putnam-Walkerly is a trusted advisor to the world's leading philanthropists. Ultra-high-net-worth donors, foundations, Fortune 500 companies, and wealth advisors seek out and benefit from her advice to transform and catapult their impact. Her clients include the J.M. Smucker Company, Robert Wood Johnson Foundation, David and Lucile Packard Foundation, Charles and Helen Schwab Foundation, Walton Family Foundation, National Center for Family Philanthropy, and the Cleveland Foundation.

Kris is also the award winning author of **Delusional Altruism: Why Philanthropists Fail To Achieve Change and What They Can Do To Transform Giving** (Wiley).