



The Putnam Guide ASKING “WHAT IF?”

Using research and development as a strategy to achieve dramatic impact

by Kris Putnam-Walkerly, MSW

“The ways in which a small foundation can deliver big impact are myriad - and limited only by the foundation’s understanding of the problem, knowledge of its own assets (beyond money), and willingness to be courageous and creative in taking action.”

Often in the world of philanthropy, the problems we wish to address seem overwhelmingly large and complex. The amounts of money deemed necessary to change systems, create lasting outcomes, and change lives for the better far outstrips even the largest grantmaking budget. And if you’re a small foundation, the scant assets you have to wage against the world of need can seem almost pointless.

But as with any complex problem, the key is to break it down and examine its parts to discover that pivotal point where your action can begin to fuel a solution. David felled Goliath with a single stone, and it only took one arrow from Paris to bring Achilles crashing to the ground. As a small foundation, you can have significant impact if you find your strength and play your role wisely.

The ways in which a small foundation can deliver big impact are myriad — and limited only by the foundation’s understanding of the problem, knowledge of its own assets (beyond money), and willingness to be courageous and creative in taking action.

One way to achieve big impact is by engaging in research and development (R&D) philanthropy.



What do we mean by R&D philanthropy?

For most people, the notion of “R&D” calls up scientists in a lab creating new medicines, or engineers designing the next phase of electronics. While these are definitely R&D activities, they are also extremely expensive propositions, and not exactly suited to what we consider to be R&D philanthropy.

Instead of thinking about multimillion-dollar labs, think instead of a process of inquiry. R&D philanthropy is planned, creative work aimed at discovering new knowledge or developing new and significantly improved goods and services to address an identified need. It is rooted in the question “What if?” — the answer to which can cost a goodly sum, or almost nothing at all.

More specifically, R&D philanthropy can include:

- Basic research — activities aimed at acquiring new knowledge or understanding without specific immediate commercial applications or uses
- Applied research — activities aimed at solving a specific problem or meeting a specific commercial objective
- Development — systematic use of research and practical experience to produce new or significantly improved goods, services, or processes

For a foundation, basic research could be as simple as conducting a community needs scan to discover and share what area residents consider the biggest barriers to their own economic stability. In this example, let’s assume that transportation to good jobs was identified as the number-one barrier. A foundation could invest in applied research to address the transportation issue. That applied research could take the form of convening local transportation organizations, bringing in national experts to help assess the need more deeply and suggest potential solutions, or sponsoring a brainstorming session to imagine an entirely new transportation system. Then, suppose that as a result of the applied research, the community came up with the idea of an Uber-style app that low-income residents could use, funded by local transportation dollars, to get to and from work more efficiently. The foundation could support the

development and testing of that new app as part of its R&D philanthropy strategy.

How does it work? 12 tools of R&D philanthropy

As mentioned above, the ways in which foundations can engage in R&D philanthropy are limitless, but here are a dozen of the most common practices. Note that many of them overlap or complement one another, which is indeed the nature of ongoing research and development in any field.

1. Fund research.

This is R&D philanthropy at its most basic. By supporting research, you add to the available knowledge about a specific need or a potential solution. Funding research can be a huge investment, such as the \$3 billion pledged by Mark Zuckerberg and Priscilla Chan to prevent, cure, and manage all diseases by the end of the century. But it also can be relatively modest, like the investments in applied research made by the small Barbara Lee Family Foundation in Massachusetts. The goal was to learn about barriers to women seeking governorships and to discover strategies to combat those barriers. The foundation used its new knowledge to develop a series of simple tools for female gubernatorial candidates. Although the Barbara Lee Family Foundation doesn’t claim credit, the number of women governors has doubled in the 10 years since their R&D was first shared.

Research does not have to be conducted nationally to be important. Local research on a community issue can shed light on problems and solutions that might never be uncovered without the additional knowledge that research provides. It can also elevate voices: Research in the form of public opinion polls or neighborhood surveys can bring new perspectives and ideas to old conversations.

2. Conduct a needs assessment.

Technically, a needs assessment is a form of research, but it deserves special attention because of its specific focus on determining community need. Research that helps clearly define needs is absolutely essential to developing effective



solutions. For example, when the Cleveland Foundation wanted to build on its investments in early childhood by extending support to youth from ages six to early adulthood, it engaged in a deep assessment of need for that new target population. Their needs assessment included reviewing data on poverty, high school graduation rates, teen pregnancy, youth violence, and employment, as well as existing programs that served youth. This assessment helped the foundation understand which neighborhoods had the greatest needs, and it was critical in forming the MyCom youth development initiative (mycom.net).

In the small town of Lancaster, South Carolina, the J. Marion Sims Foundation used a leadership transition to conduct a series of needs assessments and listening tours in its local community. The learning from that research will inform not only the foundations' work but that of other area nonprofits, government agencies, and businesses as well.

3. Scan for solutions.

Sometimes the best answers are already out there, creating change in similar communities in a neighboring county or on the other side of the country. Conducting a field scan for best practices or a local scan for assets to apply to a problem are both forms of research that foundations can fund with relatively little expense. For example, in order to inform its own work to achieve health equity, the Robert Wood Johnson Foundation commissioned a scan of other funders to determine who was doing what, and how, and to what effect. The findings of that scan are informing RWJF and, because the foundation is sharing its results, also helping build knowledge within the entire field.

4. Convene.

No organization is better suited to bringing people together than foundations — especially around thorny issues. Foundations provide a natural “safe space” for open discussion that can lead to better understanding of problems and solutions. Of course, most R&D-style discussions aren't likely to be thorny; the foundation's role may be to encourage creativity and ideation, convince participants that there are no assumptions as to outcomes, and encourage everyone involved to explore and discuss openly and honestly.

In Oregon, for example, the Leightman Maxey Foundation attended a regional nonprofit conference and realized that none of the organizations working in the area of nutrition — a foundation focus area — knew much about each other. The foundation decided to convene these agencies for a “get to know you” conversation, along with government entities and businesses that also played a role in nutrition. After the first meeting, the group encouraged the foundation to support regular convenings, and these have evolved into new partnerships and approaches to nutrition education and service delivery.

5. Generate innovations.

“Innovation” is a big word with many connotations, ranging from a tangible product to a great new idea. Foundations can fund both kinds of innovations, as well as the process of coming up with them. For example, the Rockefeller Foundation specifically supports the creation of new ideas by funding a number of “social innovation labs” around the world. But why not create one in your own community? An innovation hub doesn't have to be a fancy setting — just a space where ideas are encouraged to flow freely. A small foundation could fund an innovation hub at a local college or university, or in its own conference room.

Foundations can also fund the development of innovative ideas. For example, when working with domestic violence shelters, the Blue Shield of California Foundation learned that the shelters were challenged by the task of paying for hotel room beds for victims of violence when their shelters were full. The foundation connected a group of shelters with an app development company, and the result of that collaboration was a new SafeNight app that allows shelters to crowdsource funding for hotel beds in real time, as needed.

6. Seed a great idea.

Providing “seed funds” to get a new program, organization, product, or service off the ground is a great point of leverage. Often, the first funding source is the hardest for an entrepreneur (social or industrial) to obtain. But by providing that first infusion of funding, you can provide hope and further inspiration — and also signal to other would-be investors that the new idea has merit.



Plus, you don't have to provide seed funding in isolation. Challenge grants that bring in other funders are also a useful tool for gathering seed money.

Funders can also “seed the field” to support the germination of new ideas in a variety of nonprofits. This approach can be especially helpful when a field is new and effective solutions are not yet clear. By making several grants to a number of different organizations with different ideas, you can see which grow and become ripe for further investment.

7. Support piloting or testing.

Sometimes great ideas can fail when they are fully implemented too quickly. Perhaps they aren't thought through quite enough. Perhaps they required more up-front legwork to build a coalition of supporters or customers. Perhaps they weren't such great ideas in the first place. In any case, piloting or testing an idea before undertaking a full-fledge launch is a valuable step in the R&D process. In addition to proving (or disproving) the viability of an idea, it also provides an opportunity for tweaking and refining in real time. Piloting and testing can be a huge undertaking (like a multiyear clinical trial with tens of thousands of patients) or it can be fairly simple (like the testing of an early reading program in a local kindergarten classroom). Who knows? The program you help pilot or test in one location could become a national best practice!

8. Evaluate effectiveness.

Many programs, projects, and approaches address various areas of need with the very best of intentions. But intention and assumption do not equal proof that an approach is effectively doing what it set out to do. Funding evaluations may not seem as sexy as generating innovations. However, it is every bit as important to making sure that ideas that work are recognized, or to pointing out ideas that aren't working and how they need to change. Fortunately, there are hundreds, if not thousands, of qualified evaluators out there — in universities, in companies, or in solo practice — who can provide that crucial, objective assessment of effectiveness.

9. Document success.

Once you've researched and developed a program, you can help others replicate or expand it by documenting how it works, the resources required, the potential challenges, and the steps to take from A to Z. This will let others take your idea to scale more rapidly and efficiently. It can also provide broader knowledge to the field. Sharing stories of what went well, what went wrong, and what was learned from any effort helps others target their own efforts more effectively and avoid pitfalls. Documenting does not have to be expensive. It can be as simple as an online manual or a series of blog posts.

10. Disseminate everything.

It's likely that at some point you've heard about a great new idea or program or promising practice and thought, “More people ought to know about that.” Funders often miss the obvious step of sharing information themselves. At the most basic level, you can disseminate the good ideas that cross your path through your own newsletters, blogs, or presentations. You can also invest in helping grantees or groups spread the word about their work. For example, back in 1988, the Horizons Foundation (a relatively new LGBT community foundation in San Francisco) provided a small grant to the Kaposi's Sarcoma Foundation for its first newsletter, in which KSF shared information about a new epidemic that had already infected approximately 650 people — Acquired Immune Deficiency Syndrome. It was the first time any foundation in the U.S. supported an AIDS service provider, and one of the earliest examples of the dissemination of credible information about AIDS to the public.

11. Advocate.

Think advocacy isn't really part of a research and development strategy? Think again. Advocacy is absolutely key to informing and developing public policies that have a huge impact on issues ranging from public health to public education. Within the spectrum of advocacy activities in which foundations can legitimately engage are a number already discussed in this list. For example, when the Texas legislature cut \$5 billion from public education funding in that state, 40 funders



commissioned research to gather facts about the impact of cuts, convened a group of 80 funders to educate them on potential impact, and disseminated a report for legislators that ultimately helped restore almost \$4 billion to the education budget. The Stuart Foundation in California wanted to help change state policy around public education funding. It supported research to make the case for a policy change and to provide potential solutions for problems in the state's existing funding formula. It convened other funders who shared its policy change goal, each of whom invested in a new strategy of outreach and communication to build support for change. The Stuart Foundation then documented and shared the story of its ultimate success with other funders nationwide to encourage their engagement in advocacy.

12. Take it to scale.

If there's a program or organization that is effectively meeting a need, it may be time to invest in its further development by helping it expand its reach — either by increasing the number of people served, increasing the number of locations that use the program, or helping to build a greater uptake of the ideas or principles that make the program successful. A prime example is the expansion of an evidence-based program across state lines, as with the growth of the Nurse-Family Partnership program across the U.S. Funders can even help elevate successful local experiments into state or even national policies, as did chemist John Dorr, who realized in the early 1950s that painting white lines on the outside shoulders of highways would reduce accidents. After a series of local tests proved his theory, Dorr used his own foundation to advance the practice — which is now national transportation policy.

It's important to note that taking great ideas to scale often means pushing them beyond the nonprofit sector. Microfinance was developed by forward-thinking and innovative nonprofit organizations that proved the effectiveness of that tactic. But the idea was taken to a global scale by for-profit businesses.

More than just tools: The 5 mindsets of R&D philanthropy

Adopting an R&D philanthropic strategy takes more than the suite of tools listed above. The ability to successfully engage in R&D requires shifts in thinking that move a foundation away from the relative "safety" of a purely responsive, reactionary mode of grantmaking. It requires a willingness to explore, stretch thinking, and consider a wide range of possibilities.

We've identified five mindsets that are necessary for meaningful and effective investments in R&D. These are not à la carte options — you need all five to truly embrace an R&D strategy.

1. An abundance mentality

Contrary to what one might assume from the phrase, having an "abundance mentality" has nothing to do with money. Instead, it has everything to do with your foundation's beliefs, organizational culture, and how it approaches its work. At its core, an abundance mentality is based in a belief that almost anything is possible. David conquered Goliath, and you can help conquer just about anything if you're willing to step forward and make an effort and an investment. No doubt you've seen both individuals and organizations that embrace an abundance mentality, and those who are trapped in a mentality of poverty. This is true for philanthropic investments in R&D as well. The abundance mentality includes the belief that the answers are out there, if we only are willing to invest in the search for them, and experiment.

Unfortunately, a majority of foundations have typically operated in a poverty mentality. A poverty mentality is a belief that money should not be spent on internal investment; opportunities are limited by capacity; improvement is always incremental; we should do more with less; and we don't deserve the best, fastest, or most efficient path to success. It is based on fear of failure and a misguided belief that maintaining a Spartan operation equates to delivering value for grantees and communities.



Funders with poverty mentality say things like:

- That problem is too big and we are small — we can't make an impact.
- The money we invest in research takes away from our grantees.
- What is the cheapest way we can do this?

Funders often embrace a poverty mentality in the name of stewardship or wise expenditures, like funders who refuse to ever include staff salaries in any of their grants. They may fund an evaluation, but not the evaluator's compensation. They may fund an advocacy campaign, but not the advocacy staff. Their fear is based on not wanting to create a dependence on funding for salaries, since their investment will be short term, and they believe that salaries are a basic expense that the nonprofits "should be funding anyway." Instead, funders interested in R&D should ask, "What might the nonprofit discover or develop if we make an investment in their people?"

An abundance mentality, on the other hand, is a belief that internal investment is important, opportunities are a reason to grow capacity, advances can be made in leaps and bounds, success can be replicated and improved, we can handle most situations and challenges (or bounce back quickly), and we deserve to make investments in order to realize the greatest outcomes. This mentality is based on the belief that the more you put into life, the more you get out of it.

Funders who embrace an abundance mindset ask:

- Who are the top experts who can advise us?
- What information do we need to take this to the next level?
- What piece of this can we contribute to?
- If our program were to become a national model, what might that look like?

Embracing an abundance mentality doesn't have to be expensive. In helping the Helen and Charles Schwab Foundation develop a new, strategic approach to substance abuse treatment, I was able to engage one of the world's leading experts on the topic for more than an hour on the phone to tap into his wisdom and guidance. He charged nothing, and it was time well spent to attain best-in-class insight. Why not assume every program deserves that investment, rather than assuming

you must always find the perceived cheapest or closest available resources? Only by embracing an abundance mentality can a foundation staff and board attain the freedom to think about ways that a grant of \$5,000 (or \$50,000 or \$500,000) can dramatically improve how people live, cure a disease, transform preschool education in a community, or transform a neighborhood from an area of blight to one of prosperity.

2. A culture of learning

Adopting an R&D strategy for philanthropy requires that your foundation create and support a culture of ongoing learning. After all, learning is at the core of all research and development. The more you approach work with a sense of curiosity and inquiry, the more you can research and develop new approaches.

A culture of learning is one that encourages ongoing inquiry and questioning. It is comfortable with the fact that there is always more to learn and explore, and therefore the "work" of learning is never-ending. This can be a challenge for foundation staff or board who are geared toward finding the "one" solution to a challenge, checking it off the list, and moving on. But the culture of learning and ongoing inquiry is why cell phones now fit in the palm of your hand, and why more cancers are now curable with less stress for patients.

Learning isn't that helpful if it's only happening inside the heads of a foundation's internal team. Learning should be intentional, documented, and shared. That means making room for reflection by creating formal or informal systems or processes for reflection and discussion, as well as documenting and sharing learning on a regular basis.

Learning cultures can reflect the personalities of their organizations. For example, Google gives employees one day each week to suspend normal work and focus on inquiry and innovation. The software-developer community InfoQ crowdsources its employee learning, allowing staff to post information they'd like to learn and information they'd like to share. When interests align, those who wish to share join those who wish to learn during a brown-bag lunch. The company also hosts



a series of two-hour “deep dive” trainings when staff wish to learn more. Many foundations I work with host regular brown-bag lunches for staff to learn about or discuss issues related to their work. The Kate B. Reynolds Charitable Trust even maintains a specific reserve fund for “just-in-time” learning. If an initiative or grantmaking program appears to be struggling, or a new opportunity arises, the Trust can immediately call in an expert, conduct a quick survey, convene key advisors or stakeholders, or do any number of things to learn and apply that learning in real time.

Introspection and learning take an investment of time — but it’s time well spent. Remember that intentional learning can feel as though you are purposefully hunting for failures, so it’s important to keep an eye out for things done well in addition to areas for improvement. In either case, the key is to find opportunities that the foundation can embrace in real time as its work progresses, rather than waiting for a post-mortem evaluation, when it’s too late to increase impact.

3. A culture of innovation

R&D philanthropy is by definition an investment in something new or significantly improved — which can be synonymous with “innovation.” However, “innovation” is one of those terms with many connotations, so it’s important to consider what you mean when you use it in your philanthropy. If you don’t have a clear definition, it leaves the onus to define and deliver innovation completely up to others, or it implies that innovation is something that “just happens.” Further, lack of clear definition has come to imply that innovation must be a dramatic, game-changing, disruptive new idea or practice: the iPhone of early childhood education, the Post-It note of economic development. Funders give little or no thought to how they expect grantees to be innovative — they certainly don’t help provide technical assistance or capacity support to help achieve innovation. And while everyone wants to fund innovative approaches, foundations too often look for innovations from grantees or outside sources without creating a culture of innovation within their own walls. The expectations for innovation are so high that most people naturally feel intimidated, not realizing that innovation is not the exclusive domain of those

who are “smarter” or “more creative.” In fact, every funder can incorporate innovation and thinking innovatively into their day-to-day work — from improving grantmaking processes (maybe you can make decisions in three steps instead of 30) to reimagining the role of philanthropy in solving a problem (maybe you fund professional development instead of programs) to constructing a groundbreaking new community partnership (maybe you can align multiple sectors for whole-child health and wellness).

Foundations that will succeed in funding research and development are those that intentionally engage in a process to develop innovations as a regular part of doing business. This means that:

- Top leaders — especially the CEO — serve as champions for innovation.
- The foundation believes that everyone can become innovative.
- The foundation is willing to regularly identify, test, pilot, and implement innovative ideas.
- The foundation adheres to prudent risk tolerance (see below).

4. An openness to prudent risk

Investing in R&D philanthropy means that a foundation must be willing to take risks. But not every research opportunity is a good one, and not every innovative idea should be pursued. In considering an R&D investment, assess each opportunity wisely and take risks that are prudent, calculated, and thoroughly explored. Likewise, don’t “bet the farm” on any single piece of research or in developing any individual idea, product, or service. Instead, think of each R&D investment as just one part of a diversified portfolio.

There are four criteria that can help foundations assess risk in any R&D investment:

1. Cost

What investment will this require in terms of grants, staff, outside expertise, new technology, time?

2. Benefit

What are the potential benefits to the foundation, community, field, etc.? Do the potential benefits outweigh the costs? How long until the effort achieves results?



3. Strategic fit

Does this opportunity fit with and advance the foundation's mission and strategy? There are many great ideas out there, but no foundation should invest in great ideas that take it off course or off mission.

4. Risk types

Risk can come in many forms, from potential financial losses to a damaged reputation or strained relationships with partners or community. What kinds of risk are most likely for this particular investment? How severe could they be?

Brainstorming and listing risks with foundation staff, board, and partners can help clarify the realities (and dispel misconceptions) about the risk a foundation faces in each R&D investment. But don't leave that initial list on a shelf! Instead, bring your "risk list" to every team meeting involving your investment and discuss what you've done, or can do, to continue to keep risk to a minimum.

5. A spirit of collaboration

Foundations often expect nonprofits to collaborate, but they less frequently turn that expectation on themselves. Yet there is tremendous opportunity to exponentially expand the impact of research and development investments through funder collaboration. In fact, it is rare for an individual or a funder to produce meaningful research or develop an idea all alone. Collaboration allows for greater leverage of ideas, investments, and reach to better ensure that research is thorough and conclusive, and that new products or approaches work and are relevant to those they're intended to serve.

What does it mean to collaborate? Funder collaborations happen in many different ways, all of which leverage the strengths of each collaborative partner to achieve a common goal. Collaborations can be formal and complex, with written agreements and well-defined roles and structures, or they can be a series of ongoing conversations or even simple handshake agreements. They can be long-term efforts that require a significant commitment of time and funds, or short-term tactical approaches to addressing a common need. They can require a pooling of funds for investment, or simply aligning investments toward a common goal at the

discretion of each collaborator.

But in seeking new ideas and approaches, in being innovative, funders need to look beyond their own peers. For example, in the SafeNight app example above (Tool #5), Blue Shield of California Foundation itself could never have provided the technical know-how or the connections to make that approach work. Neither could other foundations. Instead, BSCF collaborated with a for-profit software developer, nonprofit domestic violence service providers, and private hotels to make the idea a success.

Collaborations can be messy, and they can take unanticipated twists and turns. But so can innovation. In fact, we typically expect that new ideas or products require some disruption — so it stands to reason that the processes by which those new ideas or products emerge (in this case, collaboration) should be somewhat disruptive as well.

Why is R&D philanthropy a good role for foundations — and smaller foundations in particular?

All of the philanthropic dollars in the world can't solve all of the social problems that exist, but those dollars can point the way to large-scale solutions by serving as an R&D arm of society. Foundations are uniquely suited for this role, because they have no shareholders and no expectation of delivering financial returns. Therefore, they can afford to experiment, chase ideas, and take some risks in ways that government agencies and private businesses cannot.

For those who are skeptical, take a moment and consider this: If your foundation funded the pursuit of an idea — the answer to the question "What if?" — and that investment proved to be a resounding failure, what's the worst that might happen? You might be subjected to some public ridicule, or you may have people who question your stewardship decisions. But if you have engaged in a well-planned, logical, transparent process, you can overcome those sentiments. Will your community devalue the foundation as a partner? Probably not, especially if you are willing to share what you learned from your experience. Will organizations stop asking you for grants? Not likely!



Still not convinced? Here's one other path to consider: If you're not comfortable pursuing an R&D strategy yourself, consider funding a nonprofit that will. That way you're one step removed from the action, but you can still fuel the potential for success.

What if?

There are many ways to approach R&D philanthropy, and many potential benefits that can accrue to your foundation, your grantees, and your community.

While R&D may not be for the faint of heart, it most certainly isn't limited to larger institutions. In fact, smaller philanthropies can use R&D strategies to vastly multiply their impact and the outcomes for their constituencies. Smaller foundations can use their nimbleness, their autonomy, and their flexibility to explore new solutions at the community level or to insert just the right leverage to shift thinking or approaches at a national or global scale.

Consider the 12 ways you can engage in R&D philanthropy. Discuss options with your colleagues. Cultivate the five mindsets, and give yourself the freedom and permission to imagine what you might accomplish.

It starts with the courage to ask, "What if?" What happens next is yours to discover.

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- A nationally recognized philanthropic expert and advisor
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- Quoted in the Wall Street Journal, Washington Post, BusinessWeek and other media outlets
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