



The Putnam Guide

The Role of Philanthropy in Systems Change

Findings and Lessons from a Field Scan of Systems Change and Policy Advocacy in the Philanthropic Field

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“While a systems change lens can take many forms and vary specifically from foundation to foundation, what we define as systems change frameworks are more concrete and replicable from one foundation to another or provide a common point of engagement for multiple foundations at once.”

Since Andrew Carnegie established the first US charitable foundation in 1911, grantmakers have fought hard to address entrenched social problems. Billions of charitable gifts have gone to feed the hungry, house the homeless, heal the sick, and educate the underserved. For the better part of a century, responsive giving to address existing needs was the preferred approach for philanthropy.

But toward the latter part of the 20th Century, astute grantmakers began to question their ability to make change. They began to explore ways to address root causes of social issues – how to prevent disease rather than treat it, how to foster stable housing rather than temporary shelters, or how to improve access to quality education rather than provide remediation.

However, disease prevention, education, homelessness and other challenges are huge issues. Each organization that grantmakers fund is part of a larger web of organizations, government entities, and communities that make up complex systems that ultimately affect outcomes. For example, Medicaid, Medicare, state and federal regulations, and public and private healthcare providers all form a complex system of healthcare. Pre-k programs, K-12 school districts, colleges and universities, combine with myriad federal, state and local programs and standards to create a highly complicated public education system. Housing authorities, federal, state and local governments, nonprofits, shelters, and other housing providers are similarly participants in a web of funding streams and regulations that create a system of affordable housing.



When one considers the complexity and often-publicized failures of these vast networks, it's no wonder that one often hears politicians declare "the system is broken."

In order to change outcomes, grantmakers have learned that they must become engaged in changing these systems. In fact, in the National Committee for Responsive Philanthropy reported in Criteria for Philanthropy at its Best that those foundations that commit 25% of more of their giving to systems change strategies, such as advocacy, community organizing or civic engagement, have the highest impact.

This paper was created to spark conversation and ideation for foundations interested in exploring investments in "systems change." It offers a scan of the work of systems change within the philanthropic field, as well as a focus on policy advocacy – a key systems change strategy. It also provides an overview of approaches grantmakers are using, along with some examples of systems change investments at work, to help foster ongoing conversation among Foundation board and staff.

What Is Systems Change?

As with most complex concepts, "systems change" is defined in a number of ways by a number of experts and used to define change in a variety of fields. However, three common elements of systems change appear to be somewhat universal in our field scan:

Systems change:

- Addresses policies, procedures, practices and cultures across all entities that are part of the system
- Elevates voices and participation from those served by the system
- Is meant to improve experiences and outcomes for all stakeholders

In our scan, we identified three general approaches that funders use to engage in systems change work, which we classify as using lenses, frameworks and movements.

1) Using a systems change lens to drive philanthropic mission at individual foundations

The majority of examples we found during our scan were of foundations using a systems change lens – examining their own work through a specific focus

on systems change and exploring ways to elevate the value of systems change from aspiration to action. As foundations learn and grow, and come to understand why systems change work is important – even critical – for achieving their missions, they may begin to explore the ways in which their investments can interact with systems and identify areas in which they might help create systems change. They begin to look at their activities through a systems change lens. Depending on the size and focus of the foundation, this exploration may result in a foundation-wide emphasis on systems change, or a particular grantmaking program that addresses systems change, or both. There are many examples of how foundations define and apply a systems change lens, and no two approach the work in exactly the same way. A systems change lens isn't an off-the-shelf program that foundations apply, but rather originates from a foundation's mission, culture and experience.

The Dentaquest Foundation's sole focus is "improving the systems that promote optimal oral health: Policy, Funding, Care and Community." In pursuing this mission, the foundation is "guided





by a systems change framework that informs the strategies we employ to achieve the outcomes that will move us toward realizing this vision.” In other words, everything that the Dentaquest Foundation does is focused on systems change. The foundation has even created a simple dashboard that defines its goals and impact (see illustration). By focusing on a single system (oral health) and setting its sights on system change, Dentaquest clearly outlines the change it seeks and how to get there.

Unfortunately, few systems change approaches are so cut and dried, and most foundations find themselves tackling issues that are affected by myriad systems all at once.

The Robert Wood Johnson Foundation’s mission is to improve the health and health care of all Americans. It does so by applying a systems change lens to a broad range of fields that contribute to social determinants of health – from clinical care to juvenile justice to education. According to a 2015 blog post, RWJF believes that, “Systems are the practices, policies and procedures of institutions, corporations, agencies and other organizations that influence the determinants of health. Improving systems—and the way they work together—is our approach to eliminating health disparities.”

As part of its approach, RWJF created a specific “Awards for Health Equity” program targeted on organizations that are driving systems change within a variety of systems, such as foster care, higher education and parks and recreation. By announcing its support of organizations that are specifically targeting systems change, RWJF signals the importance of this work not only to its grantees and potential grantees, but to other funders, government agencies, policymakers and private organizations that are a part of the systems that affect health outcomes.

Applying a systems change lens this broadly is a significant shift that will have an impact in everything RWJF does, from program design to evaluation, from choosing grantees to aligning with partners, and from calling attention to gaps to motivating action to close them.

Not all systems change efforts originate as such. The David and Lucile Packard Foundation’s Summer

Matters initiative wasn’t created as a systems change effort, but its lens on enhancing summer learning did create the beginnings of a systemic shift in the state. Packard developed a three-prong strategy that just happened to address three key elements of systems change listed above. It sought to address summer learning loss to develop better outcomes for K-12 students. It included a broad base of participants, including local school districts, local and statewide nonprofits, and representatives from the state department of education. And it focused on changing perspectives and practices around summer learning. Packard applied its lens by funding 10 demonstration sites around the state that illustrated what a high-quality summer learning experience looks like, by supporting a network of technical assistance specialists to spread messages and practices of quality to other summer programs throughout the state, and by working closely with the state department of education to increase the focus on summer learning as part of the department’s strategic plan. Although Packard never billed this initiative as a systems-change approach, it did indeed result in some significant changes in the state’s education system to encourage quality summer learning.

Beyond the work of individual funders, a systems change lens can also apply to groups of funders allied behind a common purpose, such as in Funders Together to End Homelessness – an organization supported by Sisters of Charity Foundation of Cleveland. As with Packard, this funder affinity group did not begin with a focus on systems change, but has embraced the concept more boldly over time and encouraged its members to use a systems change lens in their own work. Applying a systems change lens in this way has the potential for particular impact, because it elevates awareness of and participation in systems change work among multiple funders who can then address the target system (in this case housing) in multiple, coordinated ways and many different locations.

2) Using shared systems change frameworks to guide philanthropic shared interest and investment

While a systems change lens can take many forms and vary specifically from foundation to foundation, what we define as systems change frameworks are more concrete and replicable from one foundation



to another or provide a common point of engagement for multiple foundations at once.

For example, the Rockefeller, Packard and Walton foundations, along with others, worked with an outside consulting firm to develop a shared systems change framework that guides their collective investments in sustainable fisheries. These foundations participated in the development of a framework that:

- Took into account their various philosophies, objectives and priorities
- Helped identify common metrics for success
- Painted a clear picture of market-based systems change and identified opportunities for philanthropic investment

In developing this framework, the foundations could not only see their own roles with regard to investment, but had a strong understanding of the roles others would need to play for systems change to occur. To change systems so that commercial fishing becomes more sustainable, for example, they would need partners to help foster new business models, create favorable policy, attract additional investors, and create demand. They also gained a clear understanding of the risks involved in the early stages of a market-based approach to systems change and the commitments they would need to make.

Working with a host of experts and other foundation leaders, The Annie E. Casey Foundation drew on existing tools and knowledge to develop a formal framework for its approach to changing systems within its own operation to make them more racially equitable. Casey's Race Equity and Inclusion Action Guide is available to any organization and includes seven replicable steps to advance and embed race equity within an organization's operations and culture. Further, Casey's work in race, equity and inclusion provides a number of tools to help implement its framework, such as race equity and inclusion assessment tools that help governments re-design their decision-making processes (see box to the right).

Using an equity frame for systems change is a growing hot topic among national foundations, and can include efforts to improve racial equity, health equity, or various other kinds of equity. With increasing levels of interest comes an increased

SAMPLE TOOLS THAT HELP PROMOTE CASEY'S SYSTEMS CHANGE APPROACH TO ACHIEVING RACIAL EQUITY

RACIAL EQUITY IMPACT ASSESSMENT. RACE FORWARD

https://www.raceforward.org/sites/default/files/RacialJusticeImpactAssessment_v5.pdf

RACIAL EQUITY IMPACT ASSESSMENTS FOR ECONOMIC POLICIES AND BUDGETS. RACE FORWARD

<https://www.raceforward.org/practice/tools>

POCKET GUIDE TO BUDGET PROPOSALS: RACIAL AND ECONOMIC EQUITY ASSESSMENT QUESTIONS. VOICES FOR RACIAL JUSTICE

<http://voicesforracialjustice.org/wp-content/uploads/2014/10/2015-REIA-Pocket-Guide.pdf>

RACIAL EQUITY TOOLKIT: AN OPPORTUNITY TO OPERATIONALIZE EQUITY. GOVERNMENT ALLIANCE ON RACE AND EQUITY

http://racialequityalliance.org/newsite/wp-content/uploads/2015/10/GARE-Racial_Equity_Toolkit.pdf

need for common frameworks that can guide employees within a particular foundation or that can help foundations work together around a common understanding about systems change. Hence, we expect to see more internal and external systems change frameworks developed around equity in the coming years.

3) Supporting systems change movements that engage a number of public and private partners to make broad based change

Changing systems in our society is complex, difficult and overwhelming work that is practically impossible for a foundation to achieve on its own. The fact that many US foundations work in relative isolation compounds the difficulty of making a meaningful investment in systems change. Fortunately, there are a number of examples of movements that are pushing for systems change in various aspects of our society.

Defining a "movement" is tricky. It could be as amorphous as a notable shift in the national



conversation around a certain topic, or as concrete as an organized effort on the part of several organizations, working toward a common set of systems change goals and building momentum and public will in the process. Both offer opportunities for foundations to engage through investments in organizations that are leading or contributing to systems change movements. For example:

- **Models for Change** represents a multi-state movement to dramatically change the juvenile justice system. It is primarily funded by the MacArthur Foundation and is part of a \$130 million investment in changing juvenile justice systems. It currently lists 24 partners and allies across the country.
- The foster care system is another example. In recent years, the national conversation has shifted to reflect a growing interest in revamping the nation's child welfare system to focus more on prevention and less on out-of-home placement. **Casey Family Programs**, an operating foundation with a long history as a child welfare agency, is scaling back its own direct services and increasing investments in consulting, public policy advocacy and research, which will help it, both take advantage of and fuel the movement. Although a lead agency or alliance for systems change did not surface during our scan, we believe that Casey Family Programs could be poised to play a leading role, and serve as a bellwether for places in which other funder might invest.
- **Cure Violence** aims to reduce gun violence by treating it as an epidemic disease that can be cured. In particular, they organize communities (social systems) to change norms. Its funders include Chicago Community Trust, the MacArthur Foundation, Robert Wood Johnson Foundation and a number of smaller philanthropies.

Keys For Fostering Systems Change

No matter how a foundation engages in systems change work, we recommend the following five rules for creating lasting social change, as published by FSG in a 2015 Stanford Social Innovation Review blog:

1. **Build on existing trends and momentum in the system.** They provide opportunities to accelerate progress and identify potential hurdles.
2. **Pay greater attention to connections and interdependence.** Systems change is complex, and requires a number of players working in close concert with one another.
3. **Employ rigor after the strategy has been developed.** Be willing to learn in real time, and don't let perfect be the enemy of good. Use tools such as feedback loops or reflection to continually hone the strategy.
4. **Be systematic about measuring systems change.** Systems changes don't lend themselves to immediate outcomes for those served by the system. First, there must be changes in behaviors within the systems themselves, such as funding flows, policy, inter-disciplinary collaborations, or professional standards and practices. Systems change efforts should be clear about measures that address these changes before looking for population-level changes.
5. **"Be the change" by building internal adaptive capacity.** As the authors write, "Systems change is not possible without shifts in individual and collective "habits of mind" that have been entrenched in the way foundations operate, such as valuing content expertise over traits such as systems thinking. Adaptive capacity—in other words, the ability to seek new information, see connections, and make ongoing changes—needs to be built at three levels: the individual, the team, and the organization.

Policy Advocacy As A Key Part Of Systems Change

Of course, one of the primary drivers of systems change in our country is public policy. Broad foundation engagement in the public policy arena is still a somewhat new development in the history of American philanthropy, but as funders work harder to trace and address root causes of social ills, engaging in policy change becomes a key part of developing an effective systems change strategy.

To be clear, the vast majority of "policy" work done by foundations is public policy *advocacy*. In its guide, *Advocacy Funding: The philanthropy of changing minds*, Grantcraft defines advocacy as, "a category



of activities – usually carried out by grantees, but sometimes undertaken directly by foundations – whose primary purpose is to influence people’s opinions or actions on matters of public policy or concern.” The Grantcraft guide points out that foundations generally use public policy advocacy to advance an idea that may be little known among the public, argue a position to defend a good idea from critics, or enrich the debate when a solution to a social problem is not readily apparent.

Many foundations shy away from policy advocacy because they fear the perceived limits and restrictions on their ability to do so. But foundations typically have far more leeway than they think. While private foundations are prohibited by law from lobbying, they can engage in a wide range of direct and indirect advocacy activities. (At a basic level, advocacy refers to activities targeted to a broader issue, such as the detrimental effects of suspension in grade school, while lobbying refers to activity regarding specific legislation, such as a bill to implement a zero-tolerance law.) Grantmaking public charities can engage in several kinds of lobbying activities in addition to advocacy. No foundation can support or oppose a particular candidate in an election, but all may engage in nonpartisan electoral activities, such as voter registration or candidate education. (For a complete explanation of rules governing foundation advocacy and permissible activities, review Investing in Change, and other materials on the Bolder Advocacy website, a project of the Alliance for Justice.)

In some cases, public policy advocacy is closely aligned or almost synonymous with systems change efforts. In other cases, policy advocacy is but one “pillar” of a broader systems change approach that also includes some or many of the systems change strategies discussed above.

The Policy Window

When considering policy advocacy, it is helpful to understand the concept of a “policy window.”

In 1984, researcher John Kingdon proposed the idea of a “policy window” — a phenomenon that occurs when problems, policy proposals and politics all converge to create an environment in which a policy is introduced into legislative discussion, whether or not it becomes law¹. This policy window is the dominant frame for many foundation discussions of policy advocacy, and it focuses on what foundations can do — within the law — to help promising policies gain the traction and support they need for passage.

Foundations should be careful not to engage in lobbying activities related to the adoption of a specific piece of legislation during the open policy window period described above. However, the legislative period is but a small time frame in terms of policy development and implementation. There is groundwork that must happen years in advance that preps the policy window for opening when the time is right, and there are numerous decisions to be made and implementation to support after a policy becomes law.

There are many opportunities for foundations to focus on the “before” and “after” that occur on either side of legislative activity, where the environment is created for policy development and where the implementation of policy becomes a reality.

Six Ways Foundations Engage In The Policy Spectrum

Before the legislative process around a new piece of public policy ever begins, foundations can be key players in shaping the landscape for that policy

Spectrum of Policy Engagement



¹Kingdon, John W. (1995) *Agendas, Alternatives, and Public Policies*. Second edition. New York: Harper Collins.



and building knowledge and momentum. This is when a foundation's non-grantmaking tools – such as convening, research and networking – can be particularly useful.

After a policy passes through legislation and becomes law, some of the harder and longer-term advocacy work can begin. Just because a policy is enacted does not mean it will receive adequate funding. The way a sweeping state or national policy is interpreted at the county level may be up for debate. Or, as a policy meets its “real world” applications, flaws may emerge that renewed advocacy efforts will be required to repair.

Here are six ways funders can support policy advocacy before and after the legislative process:

1) Vision. Foundations can use their convening power to bring together the best minds around a specific issue to spark discussion and new ideas that may become placeholders for future policy. For example, in 2015, the Winthrop Rockefeller Foundation joined forces with the Walton Family Foundation and the Arkansas Department of Education to gather a group of unlikely suspects from across the state of Arkansas to develop the first-ever statewide vision for public education. The result of this visioning process is a document that contains a number of suggested systemic and policy changes that will very likely lay the groundwork for future legislation.

At the other end of the country, Blue Shield of California Foundation, anticipating the significant changes that would come with healthcare reform and Medicaid expansion, convened panels of experts to brainstorm potential challenges and solutions, and document their findings to share broadly in the healthcare and health policy fields. As a result, policymakers requested BSCF's support in designing the state's first two Section 1115 Medicaid waiver applications.

2) Research. Foundations can supply vast amounts of objective research to inform any policy debate. For example, the Stuart Foundation in San Francisco, in conjunction with five other funders, supported deep research into the efficacy of changing California's public school funding formula. By clearly and objectively showing the pros and cons of shifting the funding model, Stuart was

able to help educators, lawmakers, unions, child advocates and other key players understand the viability of the concept.

Research also can show the effectiveness or unintended consequences of a policy after it is enacted. The Robert Wood Johnson Foundation regularly researches the actual impact of policies on behavior change and positive societal outcomes – for example, the impact of smoking bans on smoking behavior or whether the absence of high-sugar snacks in school vending machines leads to decreased obesity rates among students.

Funders can also support and evaluate projects that demonstrate possible solutions to a social challenge. For example, the MacArthur Foundation funded a project that created a locally managed marine area that demonstrated how communities could monitor the health of marine resources while conserving fisheries. One demonstration project in Fiji led to the creation of 30 more in that country. This and other public policy advocacy activities are documented in a Foundations and Public Policy paper on the Foundation's website.

3) Education. Grantmakers can play a powerful role in helping to educate a community about an advocacy issue, and can even educate policymakers directly in many cases. For the general public (non-policymakers), funder strategies may include:

- Hosting educational forums or debates
- Developing nonpartisan materials for distribution
- Speaking about issues that are affecting the community and highlight needs and possible solutions
- Supporting nonpartisan electoral education efforts, such as voter registration drives, get-out-the-vote efforts, or candidate forums

When educating policymakers directly, foundations can:

- Share research about needs and potential solutions, including evaluations
- Discuss issues and needs (without commenting on specific legislation)
- Testify before policymaking bodies (about specific legislation if requested by policymakers)



4) Advocacy Organizations. Organizations that engage in advocacy, community organizing, civic engagement, or similar activities are the backbone of policy and systems change work. They can be extremely valuable partners for systems change work, because of their deep content knowledge and grassroots networks. Providing grants to advocacy organizations allows foundations to take advantage of existing expertise and outreach ability while remaining arms length from the advocacy activities and preserving internal foundation capacity. Sisters of Charity Foundation already provides support for several advocacy organizations, and is not new to this strategy. However, there are ways funders can expand their grantmaking muscle to support these organizations in myriad ways, including:

- **Providing core operating support.** This allows advocacy grantees to use funding in ways that prove most useful to their efforts. Successful advocacy requires that organizations be nimble and flexible, and able to respond to changing circumstances at a moment's notice. Unrestricted operating support helps ensure that flexibility and allows advocacy organizations to respond more effectively when the policy landscape changes.
- **Supporting leadership development.** Leadership is an often overlooked aspect of nonprofit success, but strong leadership is absolutely critical to ensure effectiveness and sustainability. Foundations who are interested in supporting advocacy organizations might consider helping nonprofit leaders participate in existing leadership development opportunities or even creating a new leadership program for cohorts of advocacy leaders. Funders can also help nonprofit leaders receive one-on-one coaching or mentoring support.
- **Supporting advocacy networks.** Advocacy is virtually impossible to accomplish in isolation, yet many nonprofits struggle to find the capacity to engage with other organizations. The Mary Reynolds Babcock Foundation (MRBF) in North Carolina addresses this issue by intentionally supporting networks of advocacy organizations to help them connect and learn from one another, as well as align their goals and strategies to create stronger statewide and regional advocacy efforts. Network support can include funding for staffing, network communication, outreach

and growth of the network, developing group decision-making processes, providing big-picture research, and developing network leaders. MRBF's efforts are well explained and documented in the 2012 Foundation Review article, *Building the Capacity of Networks to Achieve Systems Change*.

5) Implementation. As mentioned above, once a policy is adopted, the work of implementation begins – and it is where the lion's share of work is actually contained. National or statewide policies must be interpreted and put into practice at the state or local levels, sometimes requiring additional navigation of local nuances or the generation of additional funds.

Local nonprofits and government agencies often need help in adjusting to new roles or responsibilities. Foundations can provide technical assistance, supply additional research, fund software or equipment upgrades to streamline new processes related to policies, or even support professional development for those engaged in implementation.

Implementation of new policy also provides new opportunities for innovation that foundations are uniquely suited to support. For example, when community health centers in California were adapting to new policies and regulations brought on by the Affordable Care Act, Blue Shield of California Foundation provided innovation grants, convening and technical assistance and training to clinic leaders to help them develop innovative new approaches to patient care. Rather than struggling to keep up with change, BSCF helped its clinic grantees become leaders of change.

In response to a new school funding formula in California that provides much more local control on funding decisions, the S.D. Bechtel, Jr. Foundation helps ensure that superintendents and other decision makers have the information and support they need to allocate funds in ways that best meet the needs of students and improve the quality of learning.

6) Legal Advocacy. Most policies are not implemented or enforced flawlessly. Advocacy through the court system is a complementary



measure to policy advocacy to advance policy goals. *Brown v. Board of Education* is perhaps the most famous example of legal advocacy. The Sierra Club Legal Defense Fund also uses legal advocacy to protect valuable habitats. Legal advocacy organizations can benefit from the same kinds of funding support listed above in bullet #4. Atlantic Philanthropies, in partnership with the Center for Evaluation Innovation and the TCC Group, has produced a wealth of information about legal advocacy as a strategy.

One of the most direct ways to support legal advocacy is through state legal aid associations, such as the Legal Aid Society of Cleveland, that assist marginalized populations in accessing and navigating the court systems. Legal aid organizations work to ensure that existing laws are upheld, and allow those whose voices are minimized to literally “have their day in court.” Legal aid organizations frequently focus on individuals in poverty, immigrants, victims of domestic violence and LGBT populations.

Conclusion

The systems that operate in our country did not grow overnight, and neither will the changes we wish to see in them. Systems change requires a long-term strategy and a steadfast funding commitment to that strategy. It also offers practically limitless ways for funders to engage in creating change.

The Council of Michigan Foundation summarizes funder roles to support systems change in these ways:

- Convener – Bring government, nonprofit, foundation and business to the table.
- Educator – Raise the awareness of the general public, media and policymakers.
- Partner – Join coalitions that are working towards systems change at the local, state and federal level.
- Capacity Builder – Increase the skills of your staff, board and grantees, including working in

coalitions and effectively communicating with policymakers.

- Researcher – Conduct, or fund, reports that provide statistics in support of change.
- Funder – Fund grantees advocacy and lobbying activities, and coordinate with other funders to work for change.
- Organizer and Mobilizer – Bring people together to take action.
- Litigator – Support legal cases that change systems.
- Mentor – Provide guidance on the issue to grantees.
- Stalker – Keep your eyes and ears open to discussions on the opportunities, barriers and solutions.
- Operative – Gather intelligence on similar activities across the country.
- Pacifier – Be the voice of reason in coalitions and help find solutions.
- Champion – Be a loud, and frequent, voice for opportunities and solutions.

It is important to realize that systems change requires a significant shift in thought processes for some funders. Changing systems means engaging in work with no clear timeline, which can require a very long commitment, be extremely difficult to evaluate, and bring some degree of risk. These are not the practices of short-term, program-focused, responsive grantmakers. However, when foundations are willing to engage in systems change work, they can play a crucial role in accelerating changes that are critical to their own missions, thereby achieving their own goals and improving the lives of those they serve.

Putnam Consulting Group is an award-winning global philanthropy consultancy. Since 1999, we've helped foundations, corporations and philanthropists strategically allocate more than \$350 million in grants and gifts to increase impact, share success, and advance mission. We provide experienced advising and coaching, strategy development, and communications savvy to help foundation leaders and individual philanthropists engage in transformational giving.



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- LaTida Smith, President, Moses Taylor Foundation

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- Forbes contributor, and quoted in the Wall Street Journal, Washington Post, BusinessWeek and other media outlets
- Chair of the National Network of Consultants to Grantmakers
- Co-editor of the first edition of *The Foundation Review* dedicated to the field of philanthropic consulting
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