The Strategy Behind the Design of Advocacy Communications Support

Lessons for Foundation Program Officers from The Atlantic Philanthropies’ advocacy grantmaking

By Meghann Flynn Beer and Ed Walz
Advocacy is inseparable from communications

Successful advocacy campaigns employ sophisticated communications that target anywhere from dozens to hundreds of policymakers and other influential advocates, craft research-informed messages for multiple audiences, and rely on an array of complementary tactics ranging from grassroots organizing to social media engagement.

Many foundations that fund advocacy understand the critical role communications play in policy change efforts and, increasingly, seek to integrate communications expertise into their work. But this is hardly universal—and doesn’t universally work well. Some foundations have a communications team or a lone staff person focused on organizational branding, reputation management, and publication development and dissemination, yet many do not include communications staff as part of the change strategy. And despite a decade of appeals in philanthropic literature to integrate communications into strategy development, some of the largest foundations with dedicated strategic communications staff still struggle to embed this expertise into advocacy grantmaking, in particular. Even for a foundation with a large budget and dedicated communications staff with advocacy expertise—such as The Atlantic Philanthropies—too often, there are too few communication staff to support every initiative or program area. And so, as one Atlantic advocacy grantee reflected, “Foundations often have a person that works only on communications and another who works on [other strategies] they think are important to advocacy, and there is no integration or linkage between the two.”

This requires program officers to do their best—and then hope for the best—when it comes to decisions about advocacy communications. This paper is intended to help. Its target is not foundation communications officers and consultants who are already well versed in advocacy communications. Rather, it aims to serve foundation program or communications staff newer to advocacy who are designing advocacy grantmaking initiatives and struggling with questions about how to best support grantees’ advocacy communications.

The Atlantic Philanthropies is well-positioned to offer the benefit of its experience in this area. Founded by entrepreneur Chuck Feeney in 1982, Atlantic remained anonymous for 15 years. During this time, Atlantic did not have a communications team. By 1997, when it shed that anonymity, Atlantic had already made grants on three continents and had become an experienced advocacy funder. In subsequent years, Atlantic began to hire communications staff and develop its internal communications capacity to directly share the impact of its investments and further support grantees’ communications. Embodying Mr. Feeney’s commitment to “Giving while Living,” the Atlantic board decided in 2002 to limit the life of the foundation, and make its final grants in 2016 and close its doors in 2020. To extend the impact of its work beyond the end of its grantmaking, Atlantic invested in cultivating and sharing lessons learned from its extensive advocacy grantmaking experience. This paper is part of the Atlas Learning Project, an effort to identify questions of interest to the philanthropic field and share the relevant experiences of Atlantic and other funders. To that end, this paper draws on lessons about advocacy communications support from the experiences of four Atlantic advocacy grantmaking initiatives.
Looking back at two decades of experience funding advocacy and policy change, The Atlantic Philanthropies learned a lot about how—and how not—to deliver effective support for grantees’ advocacy communications. The foundation’s first insight: “We weren’t always as intentional about the design of our communications support as we should have been.”

A Support System for Advocacy Communications

A communications support system is the mix of resources provided by a funder to help a grantee maximize the effectiveness of communications to advance its advocacy work. However, like any system, an effective advocacy communications support system is more than the sum of its parts. As the Atlantic cases illustrate, grantmakers play a critical structural role. Which resources a grantmaker offers, how a grantmaker fits them together, what is required or optional for grantees, and how a grantmaker assigns responsibility are critical decisions that determine whether a communications support system improves the impact of grantees’ advocacy efforts. Such resources could include:

- Ongoing technical assistance, which typically pairs each advocacy organization with a dedicated partner who learns about that organization’s unique needs & provides tailored support over time
- Grant funding specifically earmarked for communications activities and/or staff.
- Communications training to help advocacy organizations develop skills, such as persuasive writing or media relations
- Template materials, illustrating how chosen messages can be delivered through typical communication applications, like fact sheets, social media posts, and press releases
- Expert help with message development, sometimes informed by audience research
- A consultant charged with helping grantees develop their own communications plans
Key Atlantic Advocacy Case Examples

**Elev8**

This community schools initiative was a core strategy for Atlantic’s U.S. school reform efforts. Elev8 established community schools and school-based health centers in four states, which also engaged in state-level advocacy. Atlantic provided general operating support to a lead organization in each state. Atlantic also funded national organizations, like the communications consulting firm The Hatcher Group and the nonprofit Sargent Shriver National Center on Poverty Law. Atlantic asked these national partners to provide additional supports like trainings, reports, and other resources to state grantees. State grantees were not required to use these additional communication supports. Atlantic also asked—but did not require—grantees to use a portion of their funds to develop communications that supported advocacy strategies. Atlantic also charged the national Elev8 office and other national advocacy organizations with promoting message consistency and amplifying the voice of the place-based initiatives.

**School Discipline Reform**

Atlantic and other funders invested in advocates in 16 states and at the federal level to expose the overuse of punitive school discipline practices and the consequences of these practices. The Hatcher Group provided tailored communications resources and coaching for state and national grantees. Other national organizations were funded to provide additional optional communications resources and training for grantees, and to raise the visibility of the issue beyond the audiences grantees were already trying to reach.

**Immigration Reform**

Atlantic funded about 25 organizations working together through several campaigns to enact comprehensive federal immigration reform. Those core grantees re-granted funds and offered communications support to more than 70 additional organizations. Early on in the immigration work, Atlantic supported standard communications investments, such as hiring consultants and funding policy reports and talking points that grantees used, but each organization was using its own messaging. As the campaigns evolved, organizations agreed to adopt a shared narrative to improve message discipline. In turn, Atlantic funded America’s Voice, a national grantee, to serve as a centralized communications hub that designed messaging and coordinated communications for the campaign as a whole.

**KidsWell**

Atlantic’s KidsWell initiative was a national advocacy campaign to provide health insurance for all U.S. children, and improve enrollment and coverage systems. Through KidsWell, Atlantic funded national advocacy organizations and seven state advocacy coalitions. All state coalitions received optional communications resources from national organizations and multi-year general operating support, with encouragement from Atlantic to allocate some funds to communications. Two of the seven state coalitions also received a second supplemental grant dedicated specifically to communications.
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These cases were chosen in part because Atlantic offered different communications “support systems” to grantees in each initiative, which provides the opportunity to compare and draw conclusions about the conditions under which one approach might be better than another. This paper distills and shares cross-case insights that should be useful to foundations interested in better supporting their grantees to effectively integrate communications into their advocacy efforts.

To understand why Atlantic’s communications support was designed the way it was, and what effect these design decisions had on advocacy success, the research included a review of grantmaking records and evaluation reports, as well as 27 in-depth interviews with grantees, Atlantic program staff, consultants, and communications experts.

Insights emerged about the choices foundation staff and communications advisors made in a range of critical areas of program and communications support.

Top Insights

1. When advocacy communications support is not integrated into the grantmaking strategy, both suffer.

2. Communications assessments that are specifically tailored to advocacy can help funders and communicators more accurately anticipate grantees’ support needs.

3. When funders make and communicate deliberate choices about the objectives of communications support, collaboration between grantees and consultants is more likely to succeed.

4. Supporting advocacy grantees through a centralized hub can improve message consistency.

5. A centralized hub won’t work in all situations, and its drawbacks need to be monitored and managed.

6. General operating support provides advocates more flexibility in strategies and tactics, but there can be clear advantages in requiring grantees to use resources specifically for communications.

7. Regularly revisiting the design of a communications support system is critical to keep up with the changing needs of grantees in a complex advocacy environment.
Insights

Predictably, there is no one right approach to any of the previous issues, nor are the choices about how to design communications support systems always mutually exclusive. Each choice has its tradeoffs, and the answers might change as an advocacy initiative evolves. With these caveats in mind, the Atlantic cases help illustrate how critical choices contributed to meaningful differences in advocacy progress.
Foundation program staff working to get new initiatives off the ground juggle myriad competing priorities, from developing strategies to negotiating grant agreements to managing grant reporting to briefing foundation boards. As a result, communications support systems—the mix of communications resources and assistance provided to grantees—often get short shrift in planning grantmaking strategies. But this research suggests that time devoted to planning communications support systems during initial program design is well spent.

A deliberate planning effort that integrates a communications support system into the advocacy grantmaking strategy is, according to some, as critical to success as the smartness of the campaign communications plan or the creativity of the messaging. In other words, it’s not just the content of advocacy communications support that matters—it’s also the nuts and bolts of how it gets delivered. Interviewees stressed the importance of funders planning the “structure” of communications support, e.g., how centralized and cohesive across grantees should communications efforts be, how much the use of communications resources and coaching should be left up to grantees’ discretion, and whether communications support is best provided by one expert firm, or by different consultants selected by individual grantees.

These are not just logistical decisions, but ones that should be driven by the advocacy strategy itself. During an advocacy grantmaking program’s design phase, clarity within the foundation on essential aspects of advocacy communications can help a program officer make better choices about how to meet grantees’ needs for coordination and support. Such critical choices include:

1. The degree to which message consistency across grantees is a priority.
2. Whether support for grantees’ advocacy communications is primarily intended to increase grantees’ long-term capacity, or to contribute to near-term policy victories.
3. Whether grant requirements should place a greater priority on maximizing grantees’ flexibility to allocate funds as needed, or ensuring that some funds are dedicated to communications.

Grantee interviewees generally appreciated the communications support they received from Atlantic, believing it strengthened their communications capacity and advanced their advocacy work. However, all categories of interviewees—advocates, Atlantic staff, and communications partners—reflected that questions about how to design communications support merit more careful consideration than they usually get.
A Better Way
Too often, program officers design—or even launch—an advocacy grantmaking initiative before considering the goals and need for communications support. A better approach integrates advocacy communications support decision-making into the grantmaking strategy development from the beginning. Key questions to guide such an approach include:

1. What are your policy objectives?
2. What grantees are you considering funding?
3. How effectively do those organizations use communications as an integral element of their advocacy work?
4. Given your policy objectives and the grantees you have in mind, how do you structure communications supports?
5. How will you communicate to consultants and grantees so all have the same understanding of your expectations?
For example, one KidsWell grantee reported that the communications support they received from Atlantic helped their coalition focus more intentionally on communications, so when they talked about policy strategies they also always talked about corresponding communications strategies. The state coalition more deliberately designed communications strategies to complement other advocacy strategies—from grassroots organizing to policy development. For example, much of the state coalition’s advocacy work had focused primarily on direct communication with policymakers, but the communications support they received allowed them to hire a consultant and create a communications plan that refined their messaging, clarified their audiences, and expanded their social media strategy to reach those policymakers’ constituents. Constituencies that were better educated on children’s healthcare issues in the state were then able to exert added pressure on policymakers. State grantees also recognized that Atlantic’s national communications-focus grantees added value by attracting national media attention to the issues they were tackling, providing yet another complementary source of pressure.

However, a number of challenges later in the advocacy campaigns were attributed to a lack of clarity about the strategic objectives for advocacy communications, and how communications work ought to fit hand-in-glove with other advocacy strategies. Here are two examples:

**Elev8**
An Elev8 national grantee charged with message coordination observed that Atlantic failed to convey to state grantees upfront that delivering a unified message across state lines was critical to the strategy. States phasing in at different times complicated this aspect, so each developed different messaging and communications strategies. Originally, there wasn’t funding for national communications, so it took additional time and resources to build buy-in for a shared brand and message. This gave interviewees the sense that some windows of political opportunity were missed, the advocacy work proceeded at a slower pace than it might have, and the effort didn’t benefit as much as it could have from the mutually-reinforcing effect of a national message that complemented state level messages.

**KidsWell**
A KidsWell national communications grantee observed that its organization’s skills and orientation did not always align with states’ needs, or that state grantees did not always have the interest or bandwidth to reach out. Concerned that forcing collaboration in such cases runs the risk of harming the relationship, the national communications partner worried that many national support resources went unused. As a result, the communications aspects of the KidsWell advocacy work was not as powerful as it could have been, according to some interviewees. Another KidsWell national communications technical assistance provider reported difficulty connecting with state grantees because they came to help with communications midway through the grantmaking strategy, after grantees had already established their communications strategies. Because some of these grantee-level strategies didn’t clearly align with the national strategies, interviewees suspect that the potential impact of coordinated communications was unrealized.
Communications assessments specifically tailored to advocacy can help communicators and funders better anticipate grantees’ support needs.

As important as designing a communications support system during initial planning of an advocacy grantmaking initiative is, the KidsWell example above also illustrates the importance of understanding prospective grantees’ communications capacity—especially their capacity to effectively use communications to advance their advocacy efforts—before making grants. Though few of the Atlantic cases included formal assessments of prospective grantees’ communications capacity, foundation program staff felt that such assessments would have added value. Assessments can save time and resources by zeroing in more quickly on which nonprofits need what kinds of support at what level of intensity.

But interviewees cautioned against doing standard communications assessments that simply explore grantee communications skills and know-how. Instead, they recommend an assessment approach that considers expertise specifically in advocacy communications, the degree to which communications is integrated into the organization’s advocacy strategy, and whether a grantee has sufficient staff bandwidth and baseline skill to actually make use of communications support systems.

Explore nonprofits’ advocacy communications capacity, not just their organizational communications capacity.

Atlantic program staff found that robust communications staffing, budgets, and experience did not always mean grantees were prepared to implement effective advocacy communications. When an organization’s communications resources focus on marketing or fundraising, the organization may lack the specialized skills required for advocacy communications. Foundations considering advocacy grants to organizations whose core work is not policy advocacy (i.e., community organizers, policy analysis and data organizations, service providers, etc.) especially need to assess this subtle but important distinction.

Learn whether and to what degree communications is an integral part of the organization’s advocacy strategy.

Among the Atlantic cases, the relationship between a grantee’s advocacy and communications strategies ranged from completely unrelated to tightly integrated. In general, program staff reflected that grantees who had a clear theory of change about how communications amplify their advocacy efforts were more likely to influence policymaking decisions.
Some Atlantic grantees saw communications as a distinct function, rather than a critical component of their policy change work. Interviewees reported that these organizations were less likely to engage effectively with communications consultants. Others outsourced their advocacy communications, enhancing their near-term capacity, but without fully integrating these functions with the organization’s core work. Atlantic program staff found that, for such grantees, communications support often did not result in lasting capacity improvements.

On the other hand, many Atlantic grantees saw their communications work as an integral part of their advocacy strategies. For example, as described above, one state-level KidsWell coalition reported that Atlantic’s communications technical assistance, trainings and coaching helped them learn to simultaneously strategize about policy advocacy strategies and complementary communications strategies. Other successful grantees used Atlantic resources to hire communications staff and establish organizational processes to ensure close coordination between communications and advocacy staff. For grantees with well-integrated communications and advocacy, Atlantic program staff reported more advocacy communications improvements as a result of communications support, and more effectiveness shaping the policy landscape in support of their advocacy work.

Nonprofits that have dedicated communications staff often make better use of communications support, while those with no communications staff are less able to absorb skills and implement communications strategies. Sometimes those who seem to need the most external support are also the least prepared to benefit from it.

Understand whether nonprofits can actually put communications support—including money, technical assistance and strategic advising, or even ready-made messaging and materials—to good use.

Atlantic staff and communications consultants observed that organizations with low in-house communications capacity—especially those with no dedicated communications staff and budget—were less likely to make effective use of communications supports. This was particularly true for Elev8 and KidsWell strategies because those initiatives included grants to organizations newer to advocacy. They observed that nonprofits with communications staff made better use of support systems and improved their social media engagement, while those with no communications staff were less able to absorb and implement the skills and activities the support system offered.

Atlantic staff and consultants also cautioned that organizations with no internal communications capacity may struggle to effectively deploy communications and messaging developed by an outside organization, such as a campaign communications hub. In such cases, interviewees suggest that program staff should consider supporting grantees to hire dedicated communications staff with advocacy experience, and offering advocacy communications skills training. Alternatively, with limited time and resources or narrow windows of political opportunity, it may be prudent to avoid including organizations with no history of in-house communications staff in the grantee cohort altogether.
### Advocacy Communications Capacity

There are several effective tools available to funders who want to assess the communications capacity of prospective grantees. But advocacy communications capacity—the degree to which an organization uses communications effectively to advance its advocacy work—is different. While a complete exploration of this multidimensional topic is beyond the scope of this brief, consider these questions to begin an advocacy-specific communications capacity conversation with prospective grantees:

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<th>Question</th>
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<td>1. When you plan an advocacy initiative, are your communications team members and/or outside communications experts active participants in the planning process?</td>
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<td>2. Does each advocacy objective in your strategy have corresponding communications objectives?</td>
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<td>3. How does the timing and focus of your communications work complement or amplify your other advocacy tactics?</td>
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<td>4. Does your advocacy landscape scan consider communications opportunities and threats?</td>
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<td>5. Does your communications team shape the development of fact sheets, reports, testimony, and other direct advocacy tools—as well press releases and social media posts?</td>
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<td>6. Do your communications experts conduct message training for spokespersons preparing for legislative testimony, as well as media interviews?</td>
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<td>7. Have you cultivated productive working relationships with journalists who cover your issue(s)?</td>
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<td>8. Are organizational executives committed to communications as essential to effective advocacy?</td>
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<td>9. Do you know which media outlets are influential to key policymakers, and do you target those outlets?</td>
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<td>10. Did your grant proposal include a robust narrative about the contributions communications would make to your advocacy success, as well as a corresponding communications budget?</td>
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When the funders of organizations in a coalition have different priorities, advocates can face conflicting mandates limiting the uptake of a particular initiative’s shared messaging and communications strategies.

Explore conflicting obligations.

Grantees often face a multitude of pressures related to communications. Different funders demand different communications expectations. Different coalitions or campaigns influence communications choices. And those choices resonate differently with different audiences. A grantee in one state KidsWell coalition noted that the coalition existed before Atlantic began its support, and not all of its members were funded by Atlantic. When other coalition members’ funders had different priorities, advocates faced conflicting mandates that hindered adoption of Atlantic’s shared messaging and communications strategies. Grantees reflected that surfacing this issue in advance and planning accordingly could have saved time, protected relationships, and avoided tensions within the coalition.

However, providing support to organizations with very low communications capacity can prove effective under certain conditions: when a grantmaking strategy focuses on near-term policy wins, when the outside communications consultant has an accurate understanding of the grantee’s capacity and is prepared to do most of the work for the grantee, and when the grantee is prepared to accept the help on those terms. In such circumstances, low capacity grantees may actually improve the initiative’s message consistency by using communications materials provided by the support system without adapting them.
When funders make and communicate deliberate choices about the objectives of communications support, collaboration between grantees and consultants is more likely to succeed.

Foundation staff must consider the central purpose for providing communications support to advocacy grantees. Is it more critical to prioritize near-term policy wins, a slower build up of communications capacity over time, or some other blended iteration all come with different implications for front-end design choices?

Insights from the Atlantic cases suggest that getting clear on the answers to these questions can contribute to better decisions about how to design advocacy communication support. This kind of clarity and agreement were rare, however, despite the fact that communications guides and many staff themselves commonly emphasize the importance of this. When asked to what end they had provided or participated in communications support or capacity building efforts, Atlantic’s grantees, program staff, and communications consultants often had different responses.

This lack of alignment around objectives can translate into confusion on the content of and expectations for communications support. Interviewees reported that key decisions about how to structure support, who selects and manages communications consultants, and how to deliver assistance were not always made with a clear theory of change in mind. Not surprisingly, advocates, program staff, and the communications consultants experienced foundation-funded communications support for advocates as uneven and sometimes disappointing. One Elev8 consultant expressed frustration, observing that “if the grantees didn’t want to take our communications recommendations there was no consequence, so it was difficult to ensure quality communications.”
If near-term policy gains and long-term capacity building are both important, you can (and should) design a communications support system that delivers both.

In Atlantic’s experience, advocacy organizations sometimes need both increased internal staff capacity for communications and support from external communications partners to effectively implement communications plans and apply what they learn from trainings. As one grantee explained, “Sure, technical assistance helps you build out the work plan, but staff have to implement it. And ultimately, it’s more cost efficient to hire staff to do the implementation instead of outsourcing that role to communications firms.” Many consultants emphasized that they can simultaneously provide consulting services and training to implement near-term campaign strategies while also building grantees’ internal capacity for the long term. But this requires explicit attention to and planning for both, with a clear theory about how grantees will institutionalize new skills, so capacity gains are insulated against loss due to staff turnover.

In short, the Atlantic cases suggest it is possible to have it both ways. The School Discipline Reform case saw both an increase in organizational communications capacity and in nearer term policy wins. Media scans on this topic showed that media attention tripled over the course of the grantees’ advocacy work and played a role in helping to change the conversation on school discipline nationally to build the momentum for policy changes. In 2014, the U.S. Departments of Education and Justice issued new school discipline guidelines and on the state level, more states are considering legislation. If near-term policy wins and long-term capacity building are both important, a communications support system can deliver both as long as the support is designed to fill real-time communications needs in the current campaign while simultaneously developing the organizational infrastructure, skills, staffing, and processes that are essential to long-term communications capacity. Or you can prioritize one over the other, depending on your theory of change. But building a support system that delivers the desired mix requires deliberate choices about the support system’s focus and the yardstick you will use to evaluate its success.
Supporting advocacy grantees through a centralized hub can improve message consistency.

A centralized hub approach to providing messaging and communications support can be a good fit when the grantmaking strategy requires a powerful and cohesive frame to shape how a policy issue is viewed across geographies or audiences. Multiple organizations speaking with one voice are more likely to redirect a national debate than uncoordinated messages that activate different frames and fail to reinforce one another.

A centralized hub structure worked well for Atlantic’s federal immigration reform efforts. The hub, America’s Voice, orchestrated a change in the dominant anti-immigration narrative in the United States, which framed immigrants as illegal aliens, a criminal element, and a drain on the economy. This dominant narrative prohibited a national dialogue on immigration, and America’s Voice created unified messaging for the campaign to push back and redirect the debate.

This effort succeeded in promoting a more productive debate about how, not whether, to fix America’s broken immigration system. By shifting the critical mass to change the national conversation, the relatively high degree of centralization and corresponding hub support system helped the campaign move from defense to offense.

Another consideration is whether an advocacy coalition is characterized by a partnership culture that facilitates organic coordination, or whether such coordination requires a more centralized communications hub to determine the messaging, or at least a staff person dedicated to coordinating the work of coalition members. Communications consultants and grantees caution against unrealistic expectations that coalitions can come to agreement on coordinated messaging or a shared communications strategy without strong working relationships among grantees, facilitation, and dedicated funding to drive the negotiations about communications strategies and tactics.
Without a designated communications point person to drive a process at the coalition level, it can be difficult to coordinate strategies, agree on how to use funding for communications, and implement consultants' suggestions.

Rather than using a hub structure for the KidsWell initiative, Atlantic left communications decisions up to each state coalition, with the hope that coalition members could together arrive at a coordinated messaging and communications strategy best for their local context. Results were mixed. In one of the lower-performing state coalitions, members remained committed to their own individual, uncoordinated communications strategies. Without communications staff or a designated communications point person to drive the process at the coalition level, it was difficult for them to coordinate strategies, agree on how to use their joint funding to support communications, and implement consultants' suggestions. One coalition that did have dedicated communications staff reported seamless messaging among the coalition's organizations. One technical assistance provider also suggested that it was helpful to have one person responsible for coordinating the communications strategies of coalition members.

Coalitions funded through KidsWell seemed to be more successful at communications when members chose one of their organizations to take the lead on coordinating the communications efforts for the entire coalition. Where such relationships are not well-established, and where cohesion and coordination are essential, a hub approach may prove more effective.
A centralized hub won’t work in all situations, and its drawbacks need to be monitored and managed.

When grantees working at the state or local level must deliver different messages to connect with different audiences, hubs may be less productive. When that dynamic defines the advocacy strategy, a less coordinated and more flexible support system—where grantees choose their own technical assistance providers and determine their own strategies—may be a better fit.

Atlantic’s KidsWell and Elev8 initiatives both used less centralized communications strategies to allow states flexibility in how they used their communications support. There was little to be gained from coordinated messaging across states, as each of the KidsWell states had radically different healthcare policy environments and required different messaging around Children’s Health Insurance Program (CHIP) and Medicaid expansion. They needed different communications strategies targeting different audiences, so the goal for communications support was to help grantees tailor their communications work to local contexts. For example, in New York, advocates were trying to influence the governor to adopt a healthcare exchange, so they hired a public relations firm to help with public messaging. The governor ultimately signed an executive order to pass the exchange, bypassing the legislative process where the issue was gridlocked. In Texas, policymakers rejected healthcare expansion, so the grantee’s work focused on elevating the voices of minority party policymakers who supported expanding children’s healthcare by building partnerships with the media to increase coverage of the issue, and documenting stories on their Texas Left Me Out website. The coalition supported these strategies by using their funding to hire communications staff and build their capacity—and the capacity of organizations across the state—to increase awareness of the issue.

In the Elev8 case, local grantees promoted a community schools model by mobilizing parents and allies to advocate to local and state decision makers on a range of related issues, so they needed tailored messaging that fit both their locally determined policy priorities and their unique political contexts. In Oakland, the Elev8 advocacy strategy focused on working closely with the public school system to redirect existing city and county school district funding to community schools. In Chicago, much of the advocacy work was focused on educating policymakers and preventing losses in the legislature. In this case, the local policy environment required different advocacy strategies—and therefore different communications strategies and supports. In Chicago, communications work focused on storytelling, so they used their funding to hire journalists and feature community stories on their website. In Oakland, the focus on systems change and resource distribution meant that their communications efforts focused on meeting with policymakers and mobilizing voters, so they spent their communications resources on creating a communications plan, polling, voter mailings, and media outreach.
In addition to this trade-off between cohesion and responsiveness to local needs, the Atlantic cases revealed other potential drawbacks of the centralized communications hub approach.

Selection of—and ground rules for—a hub organization can be complicated. Before America’s Voice began to play a role as the coalition’s communications hub, Atlantic funded another organization that served both as a communications hub and a re-grantor of funds to other immigration reform partner organizations. Atlantic program staff reported that some campaign partners were frustrated that funders elevated one organization to a position of influence and control over other partners, and over the campaign as a whole. Many rejected the centralized communications and messaging and went their own way. It wasn’t until Atlantic began funding America’s Voice—which grantees themselves saw as a natural communications leader in their space—as the hub, backed with dedicated communications resources, that coordination and shared messaging took hold.

Some argue that creating a new entity as a hub is ideal, because it sidesteps the tensions that arise when a former peer is suddenly elevated into a leadership role. However, when creating a new entity is impractical, Atlantic program staff members advise choosing an organization that has close working relationships with a broad array of partners, has earned their trust, and has played an organic role in leading the coalition’s communications.

Atlantic’s experience also suggests that a middle-ground approach of limited centralization can be productive. In Atlantic’s School Discipline initiative, grantees worked primarily as state-level coalitions, but the foundation also wanted to demonstrate that this was a national movement through similar messaging. Early on, Atlantic funded the Advancement Project to do messaging research and message development, and conduct webinars and action camps for advocates. But importantly, participation was optional for grantees, and the Advancement Project was framed as a supportive resource rather than a communications hub. This approach resulted in consistent messaging among the states, and peer-to-peer adoption of field-tested messaging that had proven effective in other locations. An example of this, reported in the evaluation of the School Discipline Reform portfolio, was that “For educators, grantees worked to frame the issue as a lack of resources, methods, and training in classroom management. Some advocates used the term ‘unintended consequences’ when speaking of school exclusion. They approached teachers by saying something like, ‘If you knew that by suspending a child you would increase their chances of dropping out of school and entering the juvenile justice system, would you be willing to try something else?’ and this worked frequently.”

The Elev8 case illustrates a different middle-ground approach. Atlantic program staff placed a priority on maximizing grantees’ flexibility to tailor communications to local needs. But program staff were also interested in influencing national policy, so they created a national office to build a unified brand and develop common explanatory language for the model. Elev8 was able to use this language to organize advocacy days in Washington, D.C., and promote the benefits of Elev8’s community schools model nationally, without constraining grantees to one-size-fits-all messages ill-suited to local audiences’ specific concerns. This suggests that a carefully designed limited-purpose hub can be effective, if all campaign partners have the same expectations of the hub’s role.
General operating support provides advocates more flexibility in strategies and tactics, but there can be clear advantages in requiring grantees to use resources specifically for communications.

Decisions about funding restrictions are often philosophical. Some funders are committed to leaving as much control in the hands of grantees as possible, and others believe they can increase the success of a larger strategy by being more directive. Atlantic staff and grantees revealed that the degree to which communications are central to the advocacy effort’s success is a factor to consider when deciding whether to require that grantees dedicate a portion of their resources thereto.

Looking back, some technical assistance providers, foundation staff, and even grantees see risks and limitations with providing general operating support in campaigns where message consistency, or cohesion and quality in communications strategies across grantees, is imperative. When the use of funds for communications was optional, Atlantic staff often saw far less focus on communications than they had hoped, even when it had been identified as a key component of the advocacy strategy. Instead, organizations with tight budgets often viewed communications as expendable.

Grantees and many foundations often see constraints on the use of funds as a negative. This is understandable, from the grantee perspective, as funding set-asides limit their ability to adapt to organization-specific needs or changing circumstances. But some grantees saw Atlantic’s constraints on the use of funds as valuable. One KidsWell grantee shared that Atlantic’s communications set-aside requirement protected resources from re-allocation by a board that did not understand that advocacy communications require investment in skills and expertise. Another KidsWell grantee, in a coalition with limited communications capacity, reported that Atlantic’s requirements to allocate funding to communications inspired them and their boards to think more strategically about communications.
When the use of funds for communications is optional, grantees often give it far less focus than it needs. It’s especially expendable for organizations with a tight budget, even when communications is identified as critical to success of the advocacy strategy.

In other cases, decisions about unrestricted funds that could have been used for communications were a source of strain within coalitions. Two state KidsWell coalitions reported that Atlantic’s requirement to use a portion of their funds for communications protected those dollars from co-optation for other purposes. This is a particular risk when organizations are working with multiple partners in a coalition that re-grants funds.

Atlantic program officers report that, on the whole, they saw better communications strategies from organizations required to use a portion of the funds for that purpose. This suggests that if effective communications are a critical element of a particular strategy, earmarking resources for communications may prove helpful.
Once an initiative launches, circumstances begin to change almost immediately. And those changes are amplified over time as advocates rack up wins (or losses), elections change the partisan balance, new or competing issues arise, and staffing turnover brings new faces to the advocacy table.

Atlantic’s immigration reform initiative illustrates this point. America’s Voice had been charged with advancing comprehensive immigration reform since its creation in 2008. However, when young undocumented immigrants stepped forward in 2010 to support the DREAM Act, the campaign faced challenges in seizing the opportunity. Reflecting afterward, a member of the Atlantic program staff felt that—had the campaign shifted its focus sooner—the DREAM Act might have had a better chance of passing.

This experience suggests a crucial role for funders in setting expectations for consultants and national grantees that provide communications support. Increasing grantees’ capacity and delivering policy wins will likely be the primary objectives. But funders can help grantees be more responsive by encouraging consultants and national partners to devote attention to monitoring the coalition dynamics and heading off emerging challenges. Including a specific focus on communications in formal evaluations and informal monitoring can help detect signals that adjustments to the communications support system are needed. Some Atlantic interviewees went a step further, recommending that program officers reserve a portion of communications funds for unanticipated expenses, so they are ready to change direction if and when needed.

Regularly revisiting the design of a communications support system is critical to keep up with the changing needs of grantees in a complex advocacy environment.
Applying the lessons: designing a communications support system that works

There are, of course, no guarantees, and the initiatives reviewed here are not exhaustive in their scope. However, the Atlantic cases offer useful insights into considerations that program officers should take into account when building a communications support system designed to achieve a foundation’s desired outcomes.

1. Decide whether message consistency or local responsiveness is more important.

If delivering a shared message by a united front of advocacy grantees is critical for an advocacy effort to succeed, consider a centralized hub, with the communications consultant or lead organization selected by and reporting to the funder, and requiring the use of the hub by grantees. Atlantic’s experience suggests that this structure is more likely than decentralized alternatives to foster the required coordination and message consistency across a coalition of diverse grantees. When designing a hub model, take care to mitigate the potential downsides detailed above, including the inherent loss of flexibility for grantees and the impact on coalition dynamics.

If it is more important that grantees have flexibility to respond to the distinct needs of local audiences, consider a less centralized approach. In such circumstances, Atlantic has had some success with models that offer campaign messages and communications tools and strategies as optional for grantees, and each grantee can select and manage its own advocacy communications consultant. Atlantic’s experience suggests that this approach is especially useful when cohesion across grantees is less important, or when coalitions have already developed trusting relationships that facilitate peer-to-peer coordination.

If local responsiveness is the primary consideration, but cohesion is still important, consider a hybrid model. For example, Atlantic’s Elev8 initiative provided tailored communications support to each state or local advocate, but funded a national organization to develop messages about the community schools movement and encouraged grantees to use them when communicating with national policymakers. One important consideration with this approach is ensuring that all parties, starting with the funder, have clear and uniform expectations of the roles played by each grantee and its contractors.
2. Decide whether communications support is an essential ingredient, and develop requirements accordingly.

If so, consider requiring advocates to set aside a portion of their funding for communications. The Atlantic cases suggest this will protect communications funding from co-optation by other functions, and help bypass differences of opinion among coalition partners about the primacy of communications. Atlantic’s experience suggests considering general operating support to provide grantees the flexibility to shift resources to communications or to other priorities, as they deem necessary to meet the needs of the moment.

3. Decide whether delivering near-term policy wins or building grantees’ long-term advocacy communications capacity is more important, or whether they are equally important.

When the goal is delivering policy wins, make clear to communications consultants that their primary responsibility is to help grantees communicate effectively in support of advancing timely policy proposals. If the latter, charge communications consultants with identifying opportunities to use timely policy debates as capacity-building exercises. As indicated, this is not an either-or choice, but a way to prioritize how to use resources.

4. Understand the advocacy communications capacity of grantees, and how prepared they are to make use of external support and technical assistance.

If there are doubts about the ability of grantees to make effective use of communications support, consider funding a staff communications position. If that is impractical, charge your communications support partner with assuming that role, or designing supports that grantees’ policy staff can use. Or, if timing doesn’t permit, consider funding alternative grantees who can make effective use of communications support. If you do not know the answer to this question, a capacity assessment that includes a distinct assessment of advocacy communications capacity is a critical first step.

5. Ensure that funders, grantees, and consultants are clear on their roles.

Once a program officer has made key decisions about the role of communications in an initiative’s advocacy strategy, it is critical to communicate those decisions to all involved. As illustrated above, start by articulating a clear theory of change that integrates communications into plans for advocacy success. Just as important, communicate that plan to national grantees, state or local grantees, and communications consultants so each party understands its own role and the funder’s expectations, as well as the roles of others on the team.
Conclusion

As philanthropic investments in advocacy evolve, leaders in foundations and advocacy communications are moving toward greater recognition of communication’s central role in effective advocacy. The experiences of Atlantic’s program staff, communications consultants, and grantees offer insights that can make the work of program officers more manageable. By being intentional about integrating communications from the very start, and by deliberately assessing the foundation’s own priorities and the needs of prospective grantees, program staff can design communications support systems that are more likely to deliver the policy change philanthropies seek.

The Atlas Learning Project

The Atlas Learning Project is a three-year effort coordinated by the Center for Evaluation Innovation to synthesize and strategically communicate lessons from the advocacy and policy change efforts that The Atlantic Philanthropies and other funders have supported in the U.S. The project’s goal is to help push philanthropy and advocacy in bolder and more effective directions. To learn more, go to atlaslearning.org.

Thank you.

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