Communicating with each other and the world

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Cover graphic designed by Joanna Fulton, Philanthropy Australia.

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Contents

From the President

In recent years, new forms of communication have begun a massive social and cultural shift. When Philanthropy Australia first came into being in 1977, would any of us have expected to be able to identify, access and read a book on trustee governance, or to have our question about a not-for-profit's legal status answered within minutes and without speaking to another person? Would we have expected that we could converse freely and instantly with colleagues overseas without making costly telephone calls – or that we could send a document to our entire membership with the press of a single button?

Community expectations about access to information have been reshaped many times in the past few decades and we can expect this to continue as new tools and technologies emerge, are tested and are either embraced or discarded – sometimes both in quick succession. Mainstream media and even government are embracing new ways of engaging an increasingly tech-savvy population. New concepts of community are forming – often on a global scale – and new modes of conversation developing. There are enormous possibilities for sharing information and ideas, and incorporating that shared knowledge into our work.

These developments also bring risks and challenges. Ease of information exchange means that facts can appear out of context; misunderstandings and rumours can easily and quickly develop. In an age where open access to information is expected, those who do not provide it freely can be seen as having something to hide. Those who choose not to communicate using new tools and technologies risk being seen as distant, old-fashioned and potentially not relevant. Access to technology is uneven and a lack of such access hinders disadvantaged populations from their potential. And with an increasing clamour of voices and opinions, there is the danger of philanthropy's messages being lost.

Philanthropy Australia holds that information, voice and influence are key elements which the philanthropic sector has employed time and again for the community benefit. Now more than ever we must consider how we as a sector can evaluate the communication tools available to us and use the most appropriate methods to ensure that philanthropy remains relevant and responsive. In this edition of *Australian Philanthropy* we explore some of the developments, tools and challenges in the field of communications. I hope you find it stimulating.

Bruce Bonyhady AM, President

From the CEO

This issue of *Australian Philanthropy*, perhaps more than most other editions of recent years, will serve in the future as a time capsule of a specific era's technologies, attitudes, and pressing concerns.

How we interact with information, and with one another, has shifted dramatically in the last several decades. It is still shifting now, and at an ever-increasing pace. I'm sure future readers of this document from 2011 will be entertained by the commentaries and explorations of social media published here in ink and on paper! But it is precisely because everything is changing so rapidly that we need to examine the current status quo. We cannot wait until things settle before we begin to adapt.

This edition opens with both sides of the Australian philanthropic sector's ongoing debate around transparency in public giving. Andrew Thomas offers an argument against the pressure to be public, while Sarah Davies provides the case in favour of transparency. Both commentators raise excellent points. The discussion continues.

As technologies make the world a smaller and more accessible place, it is important to take the opportunity to learn from overseas voices. This edition includes two reprints from other publications: 'We still need stories – in fact, we need them more than ever' by Lucy Bernholz, which originally appeared as a blog post, and 'The Dragonfly Effect' by Jennifer Aaker and Andy Smith, first published in *Stanford Social Innovation Review*.

Elsewhere in the issue there are rich learnings to be had from articles by Avalee Weir, Jane Kenny, and Emily Fuller, who each generously share the wisdom they have gained from various communications innovations and challenges.

Simon Herd is the subject of a spirited and informative feature interview, and Philanthropy Australia's own Joanna Fulton and Vanessa Meachen contribute valuable articles on social media, data visualisation, and the need for honesty in online communication.

I believe that this edition of *Australian Philanthropy* offers a wealth of information and insight into the state of communications within the sector, both for current readers and those looking back from a future that is fast unfolding.

Deborah F. Seifert

Deborah Seifert, CEO

Vale David Clarke AO

Former Macquarie Group Chairman David Clarke AO passed away on the 8th of April 2011 at the age of 69. A special edition of the Macquarie *In The Community* newsletter was released, featuring moving tributes from the community sector including Deborah Seifert and Bruce Bonyhady of Philanthropy Australia.

"Philanthropy Australia extends deepest sympathy to The Macquarie Group and his family, friends and colleagues on the death of former Chairman David Clarke AO.

The leadership shown by David and his mark made in the financial sector have been extraordinary. In addition, his involvement and support for the not-for-profit sector has been of great impact, highly valued and so very important.

David will be missed and will be remembered in so many ways as an outstanding man, especially in business and philanthropy."
– *Dr Deborah Seifert, CEO, Philanthropy Australia*

"In an era when Milton Friedman had made popular the idea that public companies and their subsidiaries should seek only to boost shareholder returns, David defied convention and established the Hill Samuel Charitable Fund.

By daring to be different and through his leadership and personal example over more than three decades, David made an outstanding contribution to Australian philanthropy."
– *Bruce Bonyhady, President, Philanthropy Australia*

Mr Clarke was Executive Chairman of Macquarie Bank from its formation in 1985 until 2007 when he ceased executive duties. He led the establishment of the Hill Samuel Charitable Fund in 1978 and was part of a leadership group that founded the Macquarie Group Foundation in 1985. He served as Chairman of both entities.

He also served on the boards and councils of groups as varied as The Salvation Army, Opera Australia, Opera Australia Capital Fund, The Royal Agricultural Society of NSW, the Australian Rugby Union, the International Rugby Board, Social Ventures Australia, the Children's Cancer Institute Australia and the Australian Olympic Foundation.

In 1992 he was made an Officer of the Order of Australia (AO) for service to business and the community and in 2001 received the Centenary Medal for service to Australian society through business and the community. In 2006, he was awarded the Richard Pratt Business Leadership Award by the Australia Business Arts Foundation.

Community Foundations Forum

Philanthropy Australia held the Community Foundations Forum in Kingscliffe, NSW, hosted by the Northern Rivers Community Foundation.

Andrew Lawson, Philanthropy Australia's Community Foundations Development Officer, brought together a program of presentations by Members and experts, including Diana Leat and Alice Macdougall. Andrew, who is available throughout the year to provide advice and support to new and established Community Foundations and to those communities interested in establishing a foundation, is a key link for Community Foundations to access information and also to talk with others and share experiences. Thanks go to the Foundation for Rural and Regional Renewal for sponsorship of this event.

Letters to the Editor

Australian Philanthropy invites readers to send feedback, thoughts, and discussion stemming from this issue's articles, which will be included on the issue's entry in the PhilanthropyWiki and also published in the following edition of the journal.

Please send any responses to editor Mary Borsellino at m.borsellino@philanthropy.org.au or at Level 2, 55 Collins Street, Melbourne VIC 3000.

Philanthropy Australia Oration by Emeritus Professor Dorothy Scott

Philanthropy Australia is pleased to provide Emeritus Professor Dorothy Scott's Oration speech transcript, presented to public audiences in Sydney on 1 September and in Melbourne on 8 September. Dorothy's breadth of knowledge on philanthropic intent is evident in her fascinating talk on *Reflections on Philanthropy: In cash or in kind? For love or money? For now or forever?*

A brief excerpt:

Most philanthropic giving in kind is not activism philanthropy but it also involves contributing knowledge and labour. From the expertise encompassed in not-for-profit boards of management to the efforts of the environmental volunteers who plant trees on a large scale, the contribution in kind is huge.

Philanthropic foundations themselves can also make a significant contribution in kind, as a recent study undertaken at the Myer Foundation by intern Lesley Harris, has illustrated. Based on surveying 10 foundations, Lesley identified the broad range of non-grantmaking contributions they made, from trustees using their influence to be advocates for grant recipient organisations, to serving on advisory councils and bringing together different organisations to pursue a common goal. Sometimes it goes much further than this. The work of the R.E. Ross Trust with Aboriginal communities along the Murray, drawing on Rebekah Lautman's social work and community development skills, is an excellent example of the added value which a philanthropic trust can provide. In some areas of grantmaking, it is not a matter of in cash or in kind. Without the in kind support, the cash will not suffice. "Can we do deeds as well as donations?" could be a useful question to build into all grantmaking practice.

Download Dorothy's speech from PhilanthropyWiki at http://philanthropywiki.org.au/index.php/

Public giving is not always the answer

By **Andrew Thomas**, General Manager Philanthropy, Perpetual Trustee Company Limited.
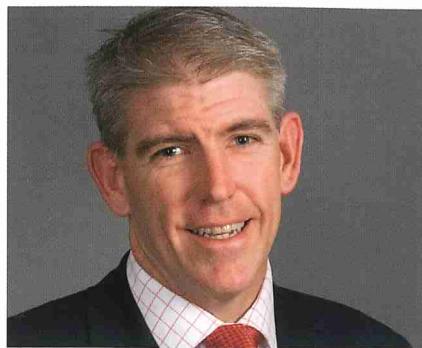
Over the past year, several high profile philanthropists have been vocal about the need for Australia's wealthy to be more public about their giving. The discussion has highlighted a couple of issues on the giving front, one of which is the preference for many wealthy Australians to keep their donations private.

In one article last year, Dick Smith said that capitalism may have a better name if rich people were less secretive about their giving. He also urged the heads of Australia's big banks to become more public with their giving efforts, suggesting these bankers should give at least 20 per cent of their income to charity.

> **"Utilising an intermediary like Perpetual allows a philanthropist to review the activities of a non-profit organisation, without the organisation knowing who the philanthropist is."**

The quest to put philanthropy back on the public agenda is a good one. And, as Dick Smith suggests, it would be helped along the way if more of Australia's richest people were willing to talk about their generosity. But the distinction between public and private giving is not the real issue, so long as people are giving. While public philanthropy may set a good example, it may also stifle potential philanthropists who prefer to keep a low profile.

Flying under the radar isn't bad.

Those working in the not-for-profit or charitable sectors need to be careful in how they talk about, and advocate, philanthropy. We want people to give, whether they want to talk about it or not. And we want them to be comfortable with how much they're giving and who they're giving to.

Publicity is an added extra – an opportunity for a case study. It shouldn't be considered a prerequisite for effective philanthropy.

Not all of Australia's wealthy live public lives. Many people choose to give privately because their life is led privately. Some private philanthropists volunteer at the same organisation to which their money is given, and don't want to be treated differently by that organisation. They also may want to ensure that their philanthropy doesn't lead to an influx of other funding requests.

There are also philanthropists who want to change others' lives without adversely changing their own, and the relationships they have, due to their favourable financial circumstances.

Perpetual works with many philanthropists who prefer to keep their giving private by using a charitable trust. We help individuals and families take an active interest in the sectors and organisations they are donating to, yet also give them the option to remain anonymous and ensure they don't have to worry about the implications of saying no to some causes and yes to others. Utilising an intermediary like Perpetual allows a philanthropist to review the activities of a non-profit organisation, without the organisation knowing who the philanthropist is.

But we still need philanthropic heroes.

Instead of getting umpired in arguments of public versus private giving, perhaps a more fruitful conversation is around sustainable giving and how philanthropists give.

The latest statistics on charitable giving for the 2008-2009 financial year show that while Australia's total giving dropped, the number of Australians who gave to charity increased. But it's still high net worth individuals who have the biggest impact, with over a third of donations made in Australia during this period ($712 million) contributed by just 51,205 people (less than half of a per cent of taxpayers). So it is clearly vital that we encourage giving.

The equally important question is whether your money is going as far as possible to help solve some of Australia's greatest problems.

Just as there is no requirement for charitable organisations to publish the names of their top 100 donors, the same should be said for people who establish a philanthropic trust and prefer to give privately. There is always scope for Australia's wealthiest people to help solve some of our country's, and in fact the world's, greatest problems; however, giving is giving, whether we see it or not. ■

The case for transparency in philanthropy

By **Sarah Davies**, CEO, Australian Communities Foundation.

What is the role of public communications in philanthropy? For sure, we all have legal and regulatory compliance obligations around reporting – take those as read. But what about broader community and public communication responsibilities and expectations?

Do we have inherent ethical and behavioural obligations around transparency, by nature of being philanthropic organisations?

The transparency debate has been neatly captured in the recent guideline reviews for both private ancillary funds (PAFs) and public ancillary funds (PuAFs). For the latter, it is an easy case to make – they are public in nature, they must solicit funds from the public and they are therefore accountable to the public. So openness and transparency, through communications, must be up front and centre.

Many private trusts and foundations (PAFs included) choose to be open and transparent about their objectives, programs, granting, results, financials and governance. They see it as a core part of their community role and a demonstration of their values and principles. But what about those who choose not to communicate?

In determining the regulatory framework for PAFs, their 'private' nature saw the case made that there were no reasonable expectations to be open and transparent. Is this right? There are certainly very strong views on both sides.

Perhaps one way to determine the case for transparency and the role of communications in philanthropy is to look at the principles of communications planning and work back.

Effective communications planning

There are four key questions at the core of communications planning: why, to whom, what and how.

There is a general expectation that the not-for-profit sector will be transparent, accountable and open to public scrutiny. This expectation is driven by the sector (the 'why') in its efforts to:

- build support and advocacy;
- engage the public and broad community;
- harness resources to create change; and
- be authentic in demonstrating its core values.

The expectation is also created by the public and government, especially in relation to the use of donations, grants and public funds and the overall favourable tax treatment of the sector, all essential to the resourcing of the sector. Philanthropy, as a sub-set or relative of the broader not-for-profit sector, shares some of the same expectations.

Generally speaking, the 'why' can be defined by five broad desired responses: to raise awareness, to build understanding, to create a belief, to create behaviour change and to generate advocacy. In working out what you are trying to achieve, you cannot skip a step – you cannot create or drive behaviour change, for example, until you have awareness, understanding and belief.

> **"The case for increased transparency and communication is not about telling everybody everything and opening the floodgates. Nor is it about forcing private individuals to become public."**

At the same time as determining the 'why' we need to be very clear about the 'to whom'. Whether communication is effective is determined by the audience. So who are we talking to? And having answered this question, we need to establish two things:

- what they currently think, feel and do; and
- what we want them to think, feel and do.

Advocacy

Everyone needs to understand this and get involved

Support and systems to facilitate systemic change

Behaviour Change

I will do something about this – and I know what to do

What's the call to action? What do you want me to do about it?

Belief

I can relate to this – I need/want to get involved

What's the proposition for me? How is it relevant to me?

Understanding

I get it – I can see this as important/relevant

Education, engagement/ involvement

Awareness

Never heard of it/them

Building knowledge and consciousness

Another factor to consider at this stage of communications planning is the broader context – what is the environment in which we are communicating? For example, is it crowded with competing messages; is there misinformation that we want to address; is it technically complex, or are we in uncharted waters?

Having worked through these issues, the 'what' and the 'how' become much easier to determine. In working out what to say, we can use rational propositions (to shape how people think), emotional propositions (to shape what people feel), killer facts (to create belief) and a call to action (to ask for a desired behaviour or response).

We have a plethora of choice about how we say it and the media or channels we choose. In principle, effective communication should be singular, relevant, truthful and persuasive. The media we choose to deliver the message should enhance its receipt and understanding by the target audience.

Relevance for philanthropy?

Let us look at the case for transparency in philanthropy in the context of these principles.

First – why? What is the case for communication?

I would argue that at a minimum, there are three reasons why philanthropy should be open and should communicate:

- to be authentic in demonstrating its core values, evidencing its vital contribution to community;

- to share knowledge and learning for public benefit; indeed we are recognising that partnerships and collaboration are more effective in addressing complex social issues than solo action; and

- because it has some level of public accountability for its favourable tax treatment.

I would argue there are numerous other reasons (to provide leadership, to encourage others, to engage the broader community, to demonstrate the role and contribution of philanthropy, etc.) but these come from a personal values set and I recognise that they are not necessarily shared.

The case for increased transparency and communication is not about telling everybody everything and opening the floodgates. Nor is it about forcing private individuals to become public. It is about determining what is important, to whom and why and then delivering targeted communication.

With this minimum level of disclosure, who should have this information and what do we want them to do with it or because of it? As an example, I have taken the three communications expectations mentioned previously and hypothesised (with some exaggeration to illustrate the point!), using the communications planning framework above.

Objective/why?	Example: target audience	Example: context/environment	Example: message and delivery
To be authentic in demonstrating core values.	Not-for-profit organisations potentially eligible for funding from the foundation: • currently trying to access contacts and grants; • want to tell them that we don't take applications; or • want to be clear about criteria and focus for applications.	Anecdotal reporting and discussion about 'plethora' of private foundations. Criticisms about lack of access unless you are 'in the know'. Public looking for good leaders and role models.	Summary of foundation purpose and operation. Website. Information can be one way or two way (if interested in grant applications or interaction).
To share knowledge and learning for public benefit.	Other trusts and foundations: • currently also funding in the same space; • want to improve practice; and • want to collaborate for greater impact.	Duplication of processes within the sector. Lack of resources in the not-for-profit sector. Increasing understanding of and interest in evidence based philanthropy.	Collaboration through network groups (such as Philanthropy Australia). Jointly published research.
Public accountability for the favourable tax treatment.	General public: • currently assuming wealthy individuals are receiving tax breaks and funding pet projects; • want to build confidence around good governance and financial practice; and • want to maintain government tax incentives to support philanthropy.	Misinformation and suspicion about dodgy practice. Government looking to encourage philanthropy. Public looking for positive role models and ethical leaders.	Website. Annual Report. Annual General Meeting.

When communication is broken down in this way, the call for transparency is no longer a one-size-fits-all, indiscriminate imposition. It is about helping us to achieve our objectives, pooling knowledge and resources and ensuring we continue to build public trust and confidence in the sector.

Indeed, by having some minimum communication requirements and transparency standards, we are highly likely to improve the practice of philanthropy across the board. If we know there will be some level of public scrutiny, we are likely to make more considered, thoughtful decisions. We are more likely to think about our preferences, priorities and decision making processes if we have to articulate them. We are more likely to reflect on what we have learned and what we want to do next time, if we have some level of public reporting. ■

We still need stories – in fact, we need them more than ever

By **Lucy Bernholz**, Founder and President, Blueprint Research and Design.

This article originally appeared as the blog post 'Buzzword 2011.3 – Storytelling[1]' at the blog Philanthropy 2173, which has been lauded as a FastCompany Magazine 'Best Blog' and a Huffington Post 'Philanthropy Game Changer'.
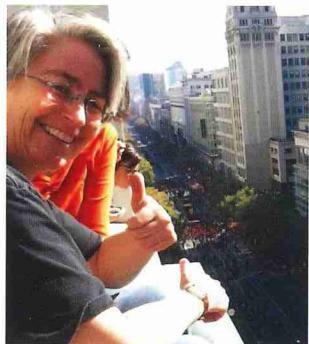
Even as technology becomes ubiquitous, embedded, and smart we still need stories. In fact, we need them more than ever.

The more data we get, the better we get at data visualization, the more we are swamped with numbers and graphs and information in general, the more we need stories. They are the oldest technology we have for making sense of things. As Drew Westen wrote in the August 6 New York Times, we need them to understand the world around us[2]. When we don't get them, lots of things go wrong, including presidencies.

Good storytelling is going to become ever more important. Stories and data[3] will need each other evermore.

New ways of telling stories will come into being. They already have. Consider Flipboard[4] - which lets you curate your own magazine on your iPad, with your twitter stream mixed into the latest from Wired or other magazines. Or The Blu[5], an attempt at engaging the entire world in creating the ocean on the web. Or Pop-Up Magazine[6], a live event that brings works-in-progress to stage for one night stands. Or My Life is True[7], by Anne Stuhldreyer[8] and Doug McCray (founder of Pop-Up) which presents two minute stories that matter. You can hear these stories on NPR and check them out on the web. Of course there are also the series of StoryCorps[9] and This I Believe[10].

Some foundations are already sharing stories. Here's the story page/what we're learning[11] from the Haas Jr Fund in San Francisco. The Foundation's site also has an interview with Dave Eggers[12], one of the great storytellers of our time, talking about storytelling. You can submit your story on the site. Here's a fun video about what makes Columbus special[13] from the Columbus Foundation.

Here are some other resources on stories in our age. The Center for Digital Storytelling[14] helps organizations of all kinds tell their stories using video and digital tools. Awhile back, TechSoup Global held a Digital Storytelling event – you can read about it here[15]. BAVC's incredible Producer's Institute features several examples of new media stories[16]. One which blew me away when I first heard about it is The Question Bridge[17] which uses video[18] and other media to enable conversations and Q and A between black men about the experience of being a black man. There are hundreds of questions and answers, each more interesting than the last. In aggregate, they become a database of insights, sliceable by every imaginable factor, interactive, and expandable.

The games and "gamification[19]" craze ties into storytelling also – games inherently involve stories, either as part of the play itself or in recounting what happened. One of the distinguishing talents of great sportswriters is their ability to tell the same story (one side won, one side lost) over and over again in compelling ways – most often telling the story to the very people who actually watched the story unfold. Now, that's good storytelling! ■

1. philanthropy.blogspot.com/2011/08/buzzword-20113-storytelling.html
2. www.nytimes.com/2011/08/07/opinion/sunday/what-happened-to-obamas-passion.html?_r=1&pagewanted=all
3. philanthropy.blogspot.com/2011/07/stories-and-data-in-our-times.html
4. www.flipboard.com
5. theblu.com
6. www.popupmagazine.com
7. www.mylifeistrue.org
8. newamerica.net/user/123
9. storycorps.org
10. thisibelieve.org
11. www.haasjr.org/what-were-learning/stories
12. www.haasjr.org/what-were-learning/stories/qanda-dave-eggers
13. columbusfoundation.org/podcast/columbus-an-open-look-2
14. www.storycenter.org
15. www.nten.org/blog/2009/09/24/techsoup-globals-free-digital-storytelling-online-event
16. www.bavc.org/stream
17. www.questionbridge.com
18. bavc.org/The_Question_Bridge
19. www.bogost.com/blog/gamification_is_bullshit.shtml

Facilitating access to justice through online engagement

By **Jane Kenny**, Grants and Legal Information Manager, Law and Justice Foundation NSW.

The Law and Justice Foundation of NSW is an independent statutory body working to improve access to justice, and contribute to the development of a fair and equitable justice system for the people of NSW.

As part of our promotion of plain language legal information, the Foundation offers a capacity building program aimed at non-government organisations (NGOs) who work to increase access to (legal) justice. The scope of the program includes running seminars on plain legal language publishing and communication, and distributing free resources such as the Publishing Toolkit.

Attendees at the two-part seminar.

> **"Participants with less experience expressed anxiety about the potential amount of time involved in managing these new communication channels. They were also concerned about the 'nasty parts' of the online world."**

The NGOs we assist provide a range of services that aim to improve access to justice – they disseminate plain legal language information, advocate on behalf of the communities they serve and engage their communities in law reform activities.

Identified need for social media training

In response to increasing enquiries from NGOs about using social media as a communication tool, the Foundation recently facilitated a two part seminar series, *Using social media to improve access to justice*.

The aim of the series was to provide participants with a basic understanding of key social media applications, so that they were empowered to select and implement the strategy that would work for them.

We decided that a hands-on workshop would provide the most benefit for participants, which unfortunately meant we had to limit numbers and give preference to community legal centres.

The presenter was James Dellow of Headshift, an agency that describes itself as "part management consultancy, part technology developer and part communications agency". James proved adept at managing the full spectrum of knowledge, experience and delight in (or fear of) social media that was present in the group.

Our participants came from diverse areas in metropolitan and regional NSW. Some came from generalist centres, and others from specialist centres that cater for specific groups such as young people, women, artists, environmentalists, people with an intellectual disability, prisoners and asylum seekers.

Sharing successes, mishaps and concerns

When James asked the nearly 30 participants to arrange themselves in a line according to their familiarity and confidence with social media, there was an equal mix of novices, enthusiasts and many in between.

James asked the group about the perceived pros and cons of using social media applications. The confident and experienced participants saw efficiency and ease of keeping in touch with people as the top pros. For example, they felt it is far more efficient and effective to communicate with young people via social media applications than by email or phone.

Participants with less experience expressed anxiety about the potential amount of time involved in managing these new communication channels. They were also concerned about the 'nasty parts' of the online world.

Regardless of their level of experience with social media, all participants saw issues relating to privacy, intellectual property and risk management as a major concern.

Having participants with a range of experience proved to be a benefit rather than a hindrance. There was certainly no hesitation on the part of those who are already tweeting, blogging, sharing, posting and flick'ring to relay their stories of successes and mishaps. Participants with little experience sought advice from those more experienced about which applications to use and why, and enquired about the impact it had on their communication with clients.

In the spirit of using different media to teach about it, James used a trailer of the *Us Now* documentary film. It demonstrated the power of mass collaborative action using social media and how it has the potential to transform the way the world is governed. It also showed how people are using social media to do their traditional work very differently – and usually in a far more effective, timely and far-reaching way.

As an example of how traditional work can be done differently using social media, the Public Interest Advocacy Centre (PIAC) told us about one of their recent projects. PIAC are using Facebook to recruit participants in their class action for false imprisonment of young people because of incorrect or out of date bail information held by authorities. PIAC have had a huge response to their campaign with currently 620 people signed up.

The video and the PIAC case study were practical examples of the key seminar messages: social media can help you do what you already do more efficiently and it can provide the impetus for doing new things you've never thought of before.

James also regularly reminded everyone that it's smart to use multiple channels to optimise the pick up of your messages. For example, although you may have essentially the same information (and in particular be driving a consistent message), you can choose to communicate it through a number of applications, as different people respond to different media.

What works?

From the Foundation's viewpoint, we aim to continue our dialogue with the seminar participants as they explore and use social media applications. In line with our research work, we want to find out what works in terms of social media and community legal education. In particular, we will be looking at what works for specific groups (e.g. young people, people with a disability), and how useful it is as a means of disseminating legal information.

We will be inviting our seminar participants to apply for Foundation grants to develop their work in this area (with a view to building a library of case studies for the sector), and to continue to get together as a group from time to time to share their experiences. ■

jkenny@lawfoundation.net.au

Useful links

Law and Justice Foundation:
www.lawfoundation.net.au

Publishing Toolkit:
www.lawfoundation.net.au/information/publishing/toolkit

James Dellow, Headshift:
www.headshift.com/au/author/james-dellow

Us Now documentary:
watch.usnowfilm.com

Public Interest Advocacy Centre (PIAC):
piac.asn.au/frontpage

PIAC False Imprisonment of young people class action on Facebook:
www.facebook.com/FalseImprisonmentOfYoungPeopleClassAction?sk=app_215792745109973

Kingsford Legal Centre Facebook page:
www.facebook.com/pages/Kingsford-Legal-Centre/123259437748652

Immigration and Advice Rights Centre Twitter account: twitter.com/#!/IARCAustralia
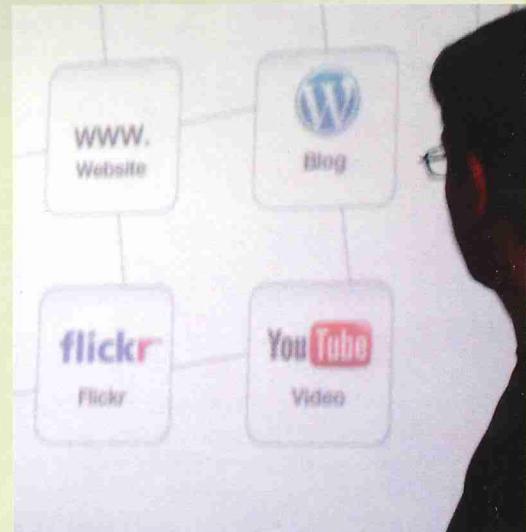
Using social media to improve access to justice.

Online grantmaking for a younger generation

By **Emily Fuller**, Program Officer, Vincent Fairfax Family Foundation.

Vincent Fairfax Family Foundation (VFFF) recently created an online network to facilitate grantmaking among third and, hopefully, fourth generation Vincent Fairfax Family members. While in its early stages, indications are that this forum is a viable alternative for decision-making and information sharing – relevant to geographically dispersed people and a younger generation for whom traditional meeting schedules aren't necessarily convenient or appealing.

In November 2010, members of the third generation of the Vincent Fairfax Family came together to discuss philanthropy and the possibility of developing an approach to grantmaking as a group of cousins. There are 12 cousins across four families, aged from the mid twenties to mid forties. They live in different cities and states and between them have 22 children so far… Getting together for a meeting is no mean feat.

Apart from age differences and geographical challenges, all have busy working and family lives as well as their own philanthropic interests – impacting their ability and appetite for involvement in family philanthropy. Some previous grantmaking had been conducted by a committee of a few cousins, with VFFF staff and Board involvement in the due diligence and approval. While this resulted in support for two great initiatives, consensus was that it had been a challenge to work within the regular VFFF cycle and process and that another vehicle better suited to the lifestyles of the younger generation might inspire more interest.

Enter 'VCF Grandchildren talk' – on the advice of Chris Boys (Social Ventures Australia) who facilitated the cousins' meeting, VFFF set up an online network using a handy and (almost) free platform called Ning – www.ning.com – to assist the cousins, their partners and hopefully children share thoughts and ideas about philanthropy. This forum is also their mechanism for proposing and approving projects for support. Two grants have been made by online resolution to date so it may be premature to claim success but there are some obvious advantages.

The online forum allows members to be as involved as they would like to be, when and where it suits them. It allows them to bring their own passions to the table and to respond to opportunities that come up without being tied to a formal process, involving Board papers, meetings and fixed timings.

This informal 'drop in and drop out' approach is seen as more realistic and equitable. The forum is open for any member to put forward an organisation or project for support, give their opinion, ask a question, make a suggestion or simply keep up with what's going on.

No one person has to lead the process, so the onus falls on individuals to champion their ideas, develop them and garner other support to have the grant approved. Submissions from invited organisations are posted and members have a month to comment. A resolution is made when three members post their approval and the VFFF Board is advised about the grants made on a quarterly basis.

The Ning platform allows members to customise their preferences to receive alerts about postings, blog comments, discussions etc., however the system relies on the willingness of members to log on and get involved. VFFF has been encouraged by the take up so far and sees a bright future ahead for online grantmaking.

Angus White, a Vincent Fairfax Family cousin offered the following reflections on the Ning site: *"While our extended family has been gradually brought into the world of philanthropy, it's obviously a dynamic and complex area. Having a shared site for discussions and administrative details makes it so much easier and avoids a barrage of emails. So far we've made two grants through this system which means much more than the communication via the Ning site. It involves phone calls, emails and site visits along with the preparation and debrief that goes with these.*

We have more engagement as a result of our preparations and another benefit is a stronger connection to the VFFF staff. As we evolve as a group, so too do our requirements for further information and understanding of the not-for-profit community, and it's great to tap into VFFF staff and share thoughts candidly.

Of 12 members of our generation, so far there's really only half that number involved, but that's enough to make it worth it, and family can dip in and out of the site as they wish. Spouses are welcome and as the next generation grows up, so too are they. We wanted an informal way of making grants, and this site provides that opportunity." ■

The Dragonfly Effect

People are clamoring for ways to use social media for social change. Two veterans of consumer psychology, marketing, and entrepreneurship say there is a replicable framework to achieve this ambitious goal. By **Jennifer Aaker** and **Andy Smith**.

Sameer Bhatia was always good with numbers. When he was in his 20s, the Stanford University grad came up with an innovative algorithm that formed the foundation of MonkeyBin, his popular consumer barter marketplace. By 31, the Silicon Valley entrepreneur was newly married and running a mobile gaming company.

Then, on a routine business trip to Mumbai, Bhatia started to feel under the weather. He lost his appetite and had trouble breathing. Bhatia chalked it up to the 100-degree weather and unbearable humidity. After a visit to a doctor at one of Mumbai's leading hospitals, however, blood tests showed that Bhatia's white blood cell count was wildly out of whack, and there were "blasts" in his cells. His doctor instructed him to return home to seek medical treatment. Upon entering the United States, Bhatia was admitted to the Robert Wood Johnson University Hospital in New Brunswick, N.J. He was diagnosed with Acute Myelogenous Leukemia (AML), a cancer that starts in the bone marrow and is characterized by the rapid growth of abnormal white blood cells that interfere with the production of normal blood cells. AML is the most common acute leukemia affecting adults.

Bhatia was facing the toughest challenge of his life. Half of all new cases of leukemia result in death. But Bhatia was determined to beat the odds and get better. After a few months of chemotherapy and other pharmacological treatment, doctors told Bhatia that his only remaining treatment option would be a bone marrow transplant – a procedure that requires finding a donor with marrow having the same human leukocyte antigens as the recipient.

Because tissue types are inherited, about 25 per cent to 30 per cent of patients are able to find a perfect match with a sibling. The remaining 70 per cent must turn to the National Marrow Donor Program (NMDP), a national database with more than eight million registered individuals.

Patients requiring a transplant are most likely to match a donor of their own ethnicity. That wasn't a promising scenario for Bhatia. He had a rare gene from his father's side of the family that proved extremely difficult to match. After typing his brother, his parents, and all of his cousins, the closest they got was a 2/8 match. Even more worrisome was that of the millions of registered donors in the NMDP, only 1.4 per cent are South Asian. As a result, the odds of Bhatia finding a perfect match were one in 20,000. Worse, there were few other places to look. One would think that a match could be found easily in India, where Bhatia's family was originally from. But India does not have a national bone marrow registry. Not a single match surfaced anywhere.

Bhatia's quest to find a donor match is a tale of the revolutionary power of social technology. Most of us are inundated daily with emails, videos, blog posts, and online invitations to participate in campaigns – pleas we generally ignore. Yet some social media-driven campaigns are so compelling that they beat incredible odds or cause millions to act. We call this phenomenon of using social technology for impact the 'Dragonfly Effect.' It is a method that coalesces the focal points of our careers – research and insights on consumer psychology and happiness with practical approaches for infectious action. The Dragonfly Effect is also an outgrowth of a class taught at the Stanford Graduate School of Business, which brought together students engaged in social media and an ecosystem of collaborators including Silicon Valley entrepreneurs, investors, and faculty and students from Stanford's Hasso Plattner Institute of Design. Not only did the class demonstrate that people are clamoring for ways to use social media for social good, but it also confirmed our belief that there is a replicable framework to achieve this goal.

Why the dragonfly? The dragonfly is the only insect able to propel itself in any direction when its four wings are working in concert. It symbolizes the importance of integrated effect and is akin to the ripple effect—a term used in economics, sociology, and psychology to indicate how small acts can create big change. To us, the Dragonfly Effect shows how synchronized ideas can be used to create rapid transformations through social media.

> **"Why the dragonfly? The dragonfly is the only insect able to propel itself in any direction when its four wings are working in concert."**

The method relies on four essential skills, or wings: 1) focus: identify a single concrete and measurable goal; 2) grab attention: cut through the noise of social media with something authentic and memorable; 3) engage: create a personal connection, accessing higher emotions, compassion, empathy, and happiness; and 4) take action: enable and empower others to take action. Throughout this process, we use the tools of design thinking, a creative approach to experimenting with and building up ideas.[1] Design thinking meshes with the Dragonfly method because it quickly takes people through a series of steps, starting with empathy and moving to hypothesis creation and then to rapid prototyping and testing.

Wing 1: focus your goal

Bhatia's circle of friends, a group of young entrepreneurs and professionals, reacted to the news of his diagnosis with an unconventional approach. "We realized our choices were between doing something, anything, and doing something seismic," says Robert Chatwani, Bhatia's best friend and business partner. The friends decided they would attack Bhatia's illness as they would any business challenge. It came down to running the numbers. If they campaigned for Bhatia and held bone marrow drives throughout the

country, they could increase the number of South Asians in the registry. The only challenge was that to play the odds they had to register 20,000 South Asians. They figured that this was the only way to find the match that would save his life. The only problem: Doctors told them that they had a matter of weeks to get the job done.

Bhatia's friends and family (Team Sameer) needed to work fast and they needed to scale up. Their strategy: tap the power of the Internet and focus on the tight-knit South Asian community to get 20,000 South Asians into the bone marrow registry, immediately. One of Chatwani's first steps was to write an e-mail with a clear call to action. In the message, he did not ask for help; he simply told people what was needed of them.

Dear Friends, Please take a moment to read this email. My friend, Sameer Bhatia, has been diagnosed with acute myelogenous leukemia (AML), which is a cancer of the blood. He is in urgent need of a bone marrow transplant. Sameer is a Silicon Valley entrepreneur, is 31 years old, and got married last year. His diagnosis was confirmed just weeks ago and caught us all by surprise given that he has always been in peak condition. Sameer, a Stanford alum, is known to many for his efforts in launching the American India Foundation, Project Dosti, TiE (Chicago), a microfinance fund, and other causes focused on helping others. Now he urgently needs our help in giving him a new lease on life. He is undergoing chemotherapy at present but needs a bone marrow transplant to sustain him beyond the next few months. Fortunately, you can help. Let's use the power of the Net to save a life.[2]

Robert then instructed readers to do three things. First, he urged them to get registered through a simple cheek swab test. He gave a link to locations where this could be done. Second, he told readers to spread the word. Third, he instructed people to learn more by visiting the website set up to help Bhatia. On it were more details on how to organize one's own drive and information about AML, plus frequently asked questions on registering. Robert sent the e-mail to Bhatia's closest friends and business colleagues— about 400 to 500 people, including fellow entrepreneurs, investors, South Asian relatives, and college friends.

And that set of friends forwarded the e-mail to their personal networks, and so on. Within 48 hours, the e-mail had reached 35,000 people.

Bhatia's friends soon learned that yet another man in their ecosystem had recently been diagnosed with the same disease—Vinay Chakravarthy, a Boston-based 28-year-old physician. Bhatia's friends immediately partnered with Team Vinay, an inspiring group of people who shared the same goal as Team Sameer. Together, they harnessed Web 2.0 social media platforms and services like Facebook, Google Apps, and YouTube to collectively campaign and hold bone marrow drives all over the country.

"Not every social media campaign can grab attention through life-or-death stories. Most need to impress through originality or take people by surprise."

Their goal was clear and their campaign was under way. Within weeks, in addition to the national drives, Team Sameer and Team Vinay coordinated bone marrow drives at more than 15 San Francisco Bay Area companies, including Cisco, Google, Intel, Oracle, eBay, PayPal, Yahoo, and Genentech. Volunteers on the East Coast started using the documents and collateral that the teams developed. After 11 weeks of focused efforts that included 480 bone marrow drives, 24,611 new people were registered. The teams recruited 3,500 volunteers, achieved more than 1 million media impressions, and garnered 150,000 visitors to the websites. "This is the biggest campaign we've ever been involved with," says Asia Blume of the Asian American Donor Program. "Other patients might register maybe a thousand donors. We never imagined that this campaign would blow up to this extent."

Perhaps the most critical result associated with the campaign, however, was the discovery of two matches: one for Bhatia, one for Chakravarthy. In August 2007—only a few months after the kickoff of the campaign— Chakravarthy found a close match. Two weeks later, Bhatia was notified

of the discovery of a perfect 10 of 10 match. Judging from the timing of when the donors entered the database, both Chakravarthy and Bhatia's matches were a direct result of the campaigns.

One of the main reasons Team Sameer succeeded was its ability to focus. They didn't get lost in the size of their challenge. They didn't try to sign up every single South Asian in the San Francisco Bay Area. Instead they focused on those who were well connected to others and who could relate to Bhatia and his story. Those types of people were easy to identify, and the scope of the challenge quickly came into focus. Perhaps most incredible was that Team Sameer and Team Vinay did not stop with just Bhatia and Chakravarthy. Ultimately, Team Sameer and Team Vinay educated a population about the value of becoming registered donors while changing the way registries work. Above all, they came up with a blueprint for saving lives—one that could be replicated.

Wing 2: grab attention

Not every social media campaign can grab attention through life-or-death stories. Most need to impress through originality or take people by surprise. Consider the Coca-Cola Co. In 2009 the company was looking for a new way to connect to young consumers. Spending on traditional media or Super Bowl ads would be predictable. Instead, they veered far from what could have been anticipated and delivered the "Happiness Machine." Just before final exams, Coke installed a vending machine in a cafeteria at St. John's University in Queens, N.Y. Instead of dispensing normal sodas, however, the machine dispensed surprises. When a student paid for one Coke, she got many Cokes … and then got other treats as well: flowers, a pizza, balloon animals, and even a 10-foot sandwich.

The students in the cafeteria were delighted by the surprises, which brought out the best in them. They shared the treats with fellow students. Coke posted a video on YouTube and advertised it with a single tweet: "Would you like a Coca-Cola Happiness Machine? Share the happiness… share the video."[3] Within two weeks, the video had been watched two million times. Although traditional Coke ads, such as those placed on *American Idol*, would gain greater reach, Coke's initial data suggest

that the Happiness Machine has had a more meaningful impact on consumers. Coke spent less than $50,000 on the video and proved the power of surprise as a tool to establish a deep emotional connection.

Or consider Nike, which in early 2010 partnered with social marketer (RED) to launch the (RED) laces campaign on World AIDS Day. Nike created eye-catching (RED) shoelaces, donating 100 per cent of the sale proceeds to fight AIDS. Working with Twitter, they put an item on the Twitter homepage promoting the movement and turned the text of all tweets red that included the hashtag #red or # laceupsavelives.[4] To ignite the Twitter community, they enlisted celebrities such as Serena Williams, John Legend, Ashton Kutcher, and Chris Rock to send the following tweet (or their own variation): "Today is World AIDS Day. Together we can fight AIDS thru sports, http://www.nikefootball.com/red #red #laceupsavelives." Nike essentially staged a virtual flashmob with the help of these influencers who were connected to millions of people. Within one day, they reached more than 10 million people with their message, turned more than a half million tweets red through the use of the promotion's hashtags, and made World AIDS Day a top five global trending topic on Twitter, driving sales of the (RED) laces and ensuring further reach well beyond the followers of a particular set of influencers.

When working to grab attention in a social media campaign, we suggest four design principles: 1) *personal*: create with a personal hook in mind; 2) *unexpected*: people like consuming and then sharing new information—draw them in by piquing their curiosity; 3) *visual*: show, don't tell—photos and videos speak millions of words; and 4) *visceral*: design the campaign so it triggers the senses through sight, sound, hearing, or taste.

Wing 3: engage

If Wing 2 of the Dragonfly Effect is about getting people to notice your cause, Wing 3, Engage, is about what happens next—compelling people to care deeply. Engage is arguably the most challenging of the four wings, because engaging others is more of an art than a science. Engagement has little to do with logic or reason. You might have brilliant arguments to explain why people should get involved, but if you can't engage them emotionally, they won't be swayed.

Barack Obama's 2008 run for the White House is perhaps the broadest campaign to successfully use social media for social change. Obama's team effectively used new social media tools—and according to some experts, this bold move secured him the presidency. Analysts at Edelman Research say that Obama won by "converting everyday people into engaged and empowered volunteers, donors, and advocates through social networks, e-mail advocacy, text messaging, and online video."[5]

Although Obama's grassroots effort was savvy at using a wide variety of existing social media and technology tools, its central channel was My.BarackObama.com (nicknamed MyBO). In many ways this easy-to-use networking website was like a more focused version of Facebook. It allowed Obama supporters to create a profile, build groups, connect, and chat with other registered users, find or plan offline events, and raise funds. MyBO also housed such user-generated content as videos, speeches, photos, and how-to guides that allowed people to create their own content—similar to a digital toolbox. The mission, design, and execution of the site echoed the single goal of the grassroots effort: to provide a variety of ways for people to connect and become involved.

The Obama team, which created the most robust set of online tools ever used in a political campaign, did so in less than 10 days, timing the site to launch around Obama's presidential campaign announcement. Keeping focused on one clear mission ("involvement through empowerment") helped them not only to execute fast but also to execute right. In its core functionality, MyBO was the same on launch day as it was on Election Day.

It was no coincidence that MyBO shared similarities with Facebook; the Obama campaign had familiarized itself with Facebook early on, first using it before the midterm elections. At that time, Facebook had just started to allow political candidates to build profile pages, and even though Obama wasn't a midterm candidate, he still wanted to harness online momentum.

The campaign also hired Facebook co-founder Chris Hughes to help it develop and execute its social media strategy.

Hughes's revolutionary contribution to MyBO was using social media not just to capture people's attention but also to enable them to become activists (without a single field staffer telling them how). These activists became a team – initially gathering online and then coordinating offline events to evangelize their cause. MyBO integrated behavioral truths (involvement leads to commitment; opportunity leads to empowerment) and social media tools to inspire people to participate in ways that they found meaningful and rewarding. My.BarackObama.com was not merely a website; it was a movement that made politics accessible through social media that people were already using every day. It changed the face of political campaigns forever. But, more important, it made getting involved as easy as opening up an Internet browser and creating an online profile.

Wing 4: take action

In many ways, Alex Scott was a regular kid. Her favorite food was French fries, her favorite color blue. She hoped to be a fashion designer one day. But in other ways, Scott was different. Just before her first birthday, she was diagnosed with neuroblastoma, an aggressive form of pediatric cancer. A tumor was removed from her back, and doctors told her parents, Liz and Jay Scott, that if she beat the cancer she would likely not walk again. Two weeks later Alex Scott moved her leg—one of the many early clues about her determination and capabilities. When Scott was four, after receiving a stem cell transplant, she came up with a plan that would change how she and her family coped with cancer from then on. "When I get out of the hospital I want to have a lemonade stand," she said. Scott wanted to use the money she made to fight cancer and help other children.

Her parents admit now that they laughed at Scott's project. Although one in every 330 American children contracts cancer before age 20, childhood cancer research is consistently underfunded. Scott was advised that it could be challenging to raise money 50 cents at a time. "I don't care. I'll do it anyway," she replied.

Like thousands of other junior entrepreneurs around the country, Scott set up a table in her front yard and started selling paper cups of lemonade to neighbors and passersby. Her hand-printed sign advertised that all proceeds would go to childhood cancer research. The 50-cent price of a glass of lemonade was ignored as customers paid with bills ($1, $5, $10, and $20) and allowed her to keep the change as a donation. Scott understood the importance of change management, and the change really added up.

Scott raised more than $2,000 that first year. Her plan was far more than a social entrepreneur's desire to earn profits for a purpose; rather, it empowered others to act for her cause. She reopened her stand for business each summer, and news of its existence and worthy cause spread far beyond her neighborhood, her town, and even her home state of Pennsylvania. She leveraged that momentum and got others to set up their own lemonade stands. Her approach was "sticky" in more ways than one.[6] Before long, lemonade stand fundraisers took place in 50 states, plus Canada and France. Scott and her family appeared on The *Oprah Winfrey Show* as well as *The Today Show*.

Not one to be easily daunted, Scott set a goal to raise $1 million for cancer research. By the time she reached $700,000, Volvo of North America stepped in and pledged to hold a fundraising event to assure that the $1 million goal would be reached.

Four years after setting up her first lemonade stand, Scott succumbed to cancer. She was eight. In her too-short life she raised $1 million for cancer research, built awareness of the seriousness of childhood cancer, and taught a generation of children (and their parents) about the importance of abstract ideals like community and charity. She also demonstrated that making a difference can be fun.

To carry on Scott's legacy, her parents established a non-profit in her name, Alex's Lemonade Stand Foundation (ALSF). Since its founding, the 501(c)(3) charity has inspired more than 10,000 volunteers to set up more than 15,000 stands. It has raised in excess of $27 million and donated to more than 100 research projects at nearly 50 institutions in the United States. Scott assembled a band of cancer-fighting evangelists (family, friends, neighbors, citizens, and corporations) that was far more powerful than anyone, even those closest to her, ever thought possible. At first, ALSF stayed connected to its constituents through two electronic newsletters, *Million Dollar Monday* and *Freshly Squeezed Friday News*, which included updates and anecdotes from lemonade stands around the country. No explicit appeal was made; they kept the news light and fun. But when ALSF started branching into social media, it found that the old rules didn't apply. It engaged its community more directly and frequently through Twitter alerts and Facebook posts. With the help of social media – 30,000 Twitter followers and 33,000 Facebook fans – the organization garnered a strong and faithful fan base, growing exponentially. ALSF also redeployed its experience to make it dead simple for anyone to hold a lemonade stand. Their site (www.alexslemonade.org) documents, down to the last detail, what one needs and includes downloadable templates and tools. The foundation sends everyone who registers a package of ALSF branded materials, with banners, signs, posters, and flyers.

People all over the world took Scott's idea and transformed it into a movement. The success of Alex's Lemonade Stand Foundation wasn't as much about raising money as it was inspiring people to take action. The organization recognized that traditional fundraising (dialing or dining for dollars) was a relatively passive act. By helping children around the country set up their own lemonade stands to fight childhood cancer, Scott mobilized a population of young ambassadors whose involvement and heightened awareness made a much more significant impact.

The organization embraced all four wings of the dragonfly: It focused on the goal to honor Scott's wish to raise money to fight childhood cancer; it grabbed attention by tapping into a deep-rooted American tradition, the lemonade stand; it engaged people's emotions by telling and retelling Scott's compelling story. And finally, it excelled at the fourth wing of the Dragonfly Effect, Take Action, the wing critical to closing the loop on previous efforts.

Ultimately, the Dragonfly Effect demonstrates that one doesn't need money or power to cause seismic social change. With energy, focus, and a good wireless connection, anything is possible. ∎

This article is based on the book The Dragonfly Effect by Jennifer Aaker and Andy Smith (John Wiley & Sons, 2010).

1. For more on design thinking, see IDEO's Human Centered Design 1 Toolkit, 2009. Available at http://www.ideo.com/work/featured/human-centered-design-toolkit
2. This e-mail is abbreviated; the full version can be found at http://faculty-gsb.stanford.edu/aaker/pages/documents/UsingSocialMediatoSaveLives.pdf
3. To view the video, see http://www.youtube.com/watch?v=lqT_dPApj9U
4. A hashtag is a short message using words or phrases prefixed with the hash symbol # that allows Twitter followers to search topic areas or current events.
5. Edelman Research, "The Social Pulpit: Barack Obama's Social Media Toolkit," 2009.
6. Stickiness refers to a quality that the most successful ideas and endeavors have: that of grabbing and holding attention. It's a concept that grew to maturity during the dot-com era, fueled by Chip and Dan Heath's bestselling book Made to Stick: Why Some Ideas Survive and Others Die, New York: Random House, 2007.

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Social media for grantmakers

By **Joanna Fulton**, Web & Technology Manager, Philanthropy Australia.

By now you've come across at least some of the social media tools and jargon – Facebook, Twitter, Flickr, YouTube, Wikipedia, blogs – likes, tweets, hashtags, wiki, RSS, and on and on. There are literally thousands of ways social media presents itself on the internet. But in essence, social media is a user-created and driven content relying on networks.

All of these tools – or platforms – work differently in many ways. Some are for the purpose of keeping up to date with all of your interests and activities, some are for business communications, others are targeted to niche interest groups, and some purely for particular mediums like photos or games.

"…social media has become a driving force in online communications – and the popular alternative to face-to-face interaction and traditional media."

Each service is its own platform, sometimes pulling in elements of other platforms. For example, Facebook is its own entity, requiring a login to access your own profile, and once logged in also allows you to include a live feed of your Twitter updates – adding in a different social media platform altogether. Many of these social media platforms work in tandem to cover all of your different social media platforms, in effect creating an aggregate of your online activity. While most are free, some require payment before you can sign up, or have extra paid features to purchase after creating an account.

Here are some examples of niche social media sharing:

iNaturalist (www.inaturalist.org) – Record fauna and flora sightings and explore maps with others' sightings.

BrandKarma (www.brandkarma.com) – Rate and share opinions on brands and their values.

GoodReads (www.goodreads.com) – Share book ratings, reading lists and recommendations.

With the statistics featured on page 20, it's hard to ignore the fact that social media has become a driving force in online communications – and the popular alternative to face-to-face interaction and traditional media.

Why Social Media for Grantmakers?

Advocacy

- Creating a movement that is followed.
- Awareness of issues/campaigns can be half the success of a funded project – let people know what you're doing.
- Approachability.

Impact

- Gain measurable insights into the impact of funded projects.
- Encourage participation.
- Assess the reception of new projects.
- Social media is not just broadcasting – it's an opportunity to get valuable feedback and insights.

Storytelling

- Everyone loves a good story. And one of the most effective ways of sharing your stories is reaching out to those you know have an interest in the subject of your story. Social media provides an excellent way of sharing with those who are seeking the subject of your stories, not just stumbling across them or keeping track of broad interest areas.

Dissemination

- Sharing knowledge and information through wide networks, who in turn pass on this information through their networks. E.g. Tweet your grant round to your 100 followers > 5 people each retweet this to their 100 followers > 5 followers of these followers retweet to their 100 followers = 1,100 people and organisations have received notification of your grant round, most of whom will be outside your own network, thereby increasing you influence and awareness.
- Sharing small successes.

YOUR TWEET, AMPLIFIED.
5 OF YOUR FOLLOWERS RETWEET YOUR TWEET
TO 50 OF THEIR FOLLOWERS…
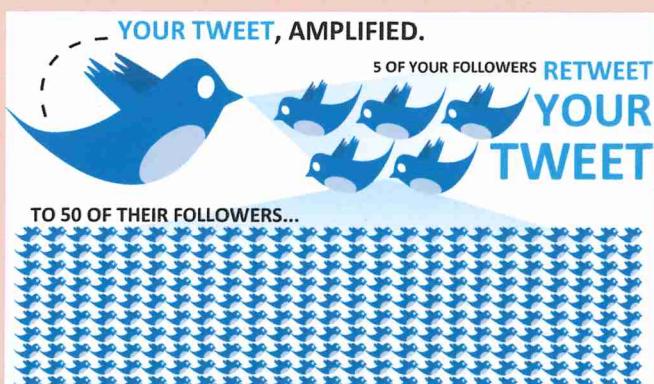
Targeting

- Spreading application requests through targeted networks – receive more relevant grant applications.
- Gain a broader audience actively engaged and interested in your areas of interest.

Networking

- Sharing knowledge between funders.
- Encouraging discussion.
- Example: @Thomastac's Tuesday philanthropy popquiz on Twitter.
- Example: #AEGN11 hashtag on Twitter for the Australian Environmental Grantmakers Network conference in mid 2011 was used by attendees to share insights for those not able to attend, kickstarting online discussion and debate.

Transparency

- Maintaining transparent communications, practices, governance and accountability is becoming part of modern grantmaking and encourages a more transparent philanthropic sector.
- Know what others are saying about your organisation.

Third Sector

- Staying active within the community, philanthropic sector, and being receptive to feedback – all of these reinforce and strengthen Australia's third sector.

Foundations and funders are very active in the US and have created standards of communicating through social media. Although US grantmakers operate differently to those in Australia, their success in harnessing social media is noticeably strong.

So what are some of the questions raised by grantmakers when considering social media?

In this section I'll be using Twitter as the social media example, but a large majority of the other social media options would return the same or similar answers, such as Facebook.

- **What are the measurable impacts for grantmakers using social media?**

  - Like most measurement for grantmaking, extrapolating numbers into something that demonstrates impact in a meaningful way can be difficult, especially of that impact is intangible. However, social media does give you the opportunity to measure direct impact by conversations and knowledge sharing. For example, you can track the number of times your tweet was retweeted > how many people clicked on your link > how much growth in your website visitors was due to links clicked on through Twitter > how much more uptake your website has had in grant applications since using social media to promote your grant round. Metrics of social media activity are trackable and reportable using one of the many tools available for just such a purpose, and in turn analysis of what works for your organisation on social media can indicate any

room for improvements or adjustments. It may be that more people respond to your tweets at 10am in the morning, therefore you'll reach a wider audience at this time of day and gain a more engaged audience.

- **Considering the sensitive nature of some funders, are there any privacy issues to be considered? How do we deal with such a public interface and the inevitable requests for funding through this? What if I'm an individual philanthropist; am I opening myself up to a whole raft of requests, information overload, and general hassle?**

  - It's important to remember that social media is not just about pushing out information. It's about conversations, and approachability. If you're not looking to have any kind of interaction, you might want to consider something like a static Facebook information page with just a link to your website. Or perhaps social media isn't the right thing for you just yet.

- **Should we have a Social Media Policy? Do we have to create yet another approach for these communications; a different way of operating?**

  - Social media should be a part of your communications strategy. Before you begin, know what you want to achieve and what kind of resources you can allocate. Make it clear who is responsible, and be clear about the 'voice' of your organisation. Have a plan in place, and if it's not working, review it. Take a look at some of the many not-for-profits publicly sharing their Social Media Policy, such as the American Red Cross 9 https://docs.google.com/present/view?id=df4n5v7k_99c7bp2xg9). Some, especially the large corporates, include a code of conduct on how staff should interact with their business using their own social media profiles.

- **We have limited staff and resources – how much time should be devoted to managing and monitoring?**

  - The answer to this is, how much time can you afford? If it's half an hour a week, that's okay. If you can keep an eye on Twitter throughout the day, every day, that's fine too. There are no rules to how much time you devote, just try to be consistent and authentic.

- **Are there any resources for funders using social platforms?**

  - A simple Google search on 'grantmaker social media' reveals the extent to which grantmakers are taking up communicating through new media. Although there are yet to be grantmaker-specific tools available to manage and measure social media, there are many guides and examples on the internet specifically for funders. The majority are US-based, but we're hoping Australia will soon be making its own dent in this space.

- **How do we integrate our social media activities into the rest of our communications and online presence (website, newsletter, grant applications, media, etc.)?**

  - Again, social media should be incorporated into your communications plan and treated with the same consideration as you would when posting news to your website. Technically, there are tools to help you keep your messages consistent throughout your online platforms,

such as automatically tweeting your blog posts and adding events to your Facebook page. The usability of these tools depend on your current technical setup, such as how your website works behind the scenes, and the usability of these tools for your staff's level of technical ability. As an example, if your website runs on Wordpress, there are many plugins which give you the option to automatically tweet a link to your new blog post.

- **If we use social media, do we even need a website anymore?**

  - Yes. Social media should not replace a website; rather it should complement your communications, with your website as a base. There are statistics to show that website visitors have shrunk in comparison to the take-up of other online mediums. But consider that social media and other new media promote accessing information in targeted ways, and internet users are becoming smarter in the way they find information. For example, having someone tweet about an article buried deep within your website not only allows them to bypass all other entry points, but also gives them an outline of what it's about. If it's relevant to them, and if they click on that link, they're most likely already sold on what they're going to see when they get there. Analysing website statistics may reveal that what may have been the main entry points three years ago, are now scattered across many areas depending on the trending topics of that date range.

- **How do I convince non-staff members – the upper echelons – of our organisation that this is something we need to be using, if not considering?**

I'm convinced – what next?

It can seem that all of these options and tools present a mountain of choice, and too much work to even begin. Information overload. Not necessarily so. The trick is to find a tool that you and your organisation feel comfortable using, and that you feel will interest your stakeholders and increase their participation.

"Don't worry, you're not behind in social media! There's no need to rush in. With current uptake and technology trends in general, new media isn't going anywhere."

So how do you do this? Identify your target audience, what they're talking about, what they're using. And experiment. Don't be afraid to try things out! Often the best way to begin is to play with these tools privately, such as creating your own Twitter account and seeing how it works. Follow some Twitter accounts that you have an interest in, and experiment interacting with them. Sign up for Facebook, add a few friends, create some interest pages and get them to give some feedback.

Like any official communications produced by your organisation, it's best not to step into social media until you have a plan in place and an idea of what you want to achieve. Remember that your audience/market are smart, and even if you think no one's watching because you haven't advertised

the fact you have an account on a social media platform, sooner or later people will notice you. Starting and stopping communications as experiments can be confusing for those following you, and harm any level of trust you may have earnt. That's why a private experiment is often the best way to start. Get an understanding of how things work before your organisation jumps in cold.

Don't worry, you're not behind in social media! There's no need to rush in. With current uptake and technology trends in general, new media isn't going anywhere. It's here to stay, no matter what form it may morph into down the track.

Here are five golden rules for starting – or expanding – your organisation's foray into social media:

1. Keep it simple
Keep your messages concise, clear and to the point.

2. Malleable
Allow your use of social media to be shaped by your audience. If they don't want to hear it, it's another bit of information clogging up their attention. If they want something – e.g. information on grant rounds – give it to them, in your own style of course.

3. Authentic
Be real. Your audience is smart, and can spot a fake. Keep your voice authentic.

4. Responsive
Engage and connect with your audience, make it a conversation, not an advertisement.

5. Timely
News travels fast online. Make sure you post and respond in a timely manner.

Measuring your social media success

Tracking your use of social media is becoming much easier. There are now many tools – some free – that give you a breakdown of your influence in social media. Not-for-profit pricing options have also become more widely offered due to the popularity amongst NGOs. Most paid metric tools offer a full suite of reporting and are useful if you have several social media accounts. ■

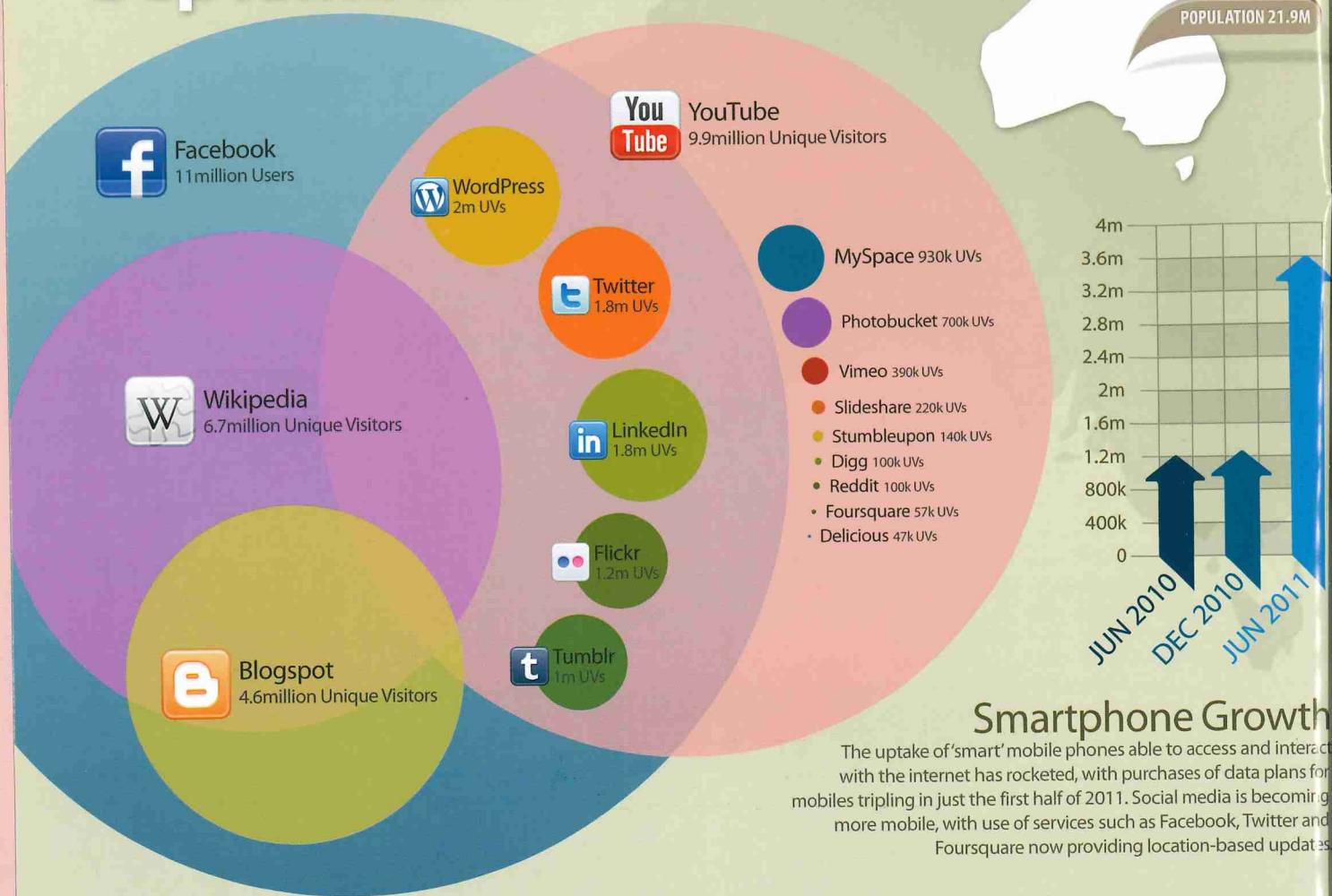Sprout Social (www.sproutsocial.com)

Hootsuite (www.hootsuite.com)

Klout (www.klout.com)

Seesmic (www.seesmic.com)

PostRank (www.postrank.com)
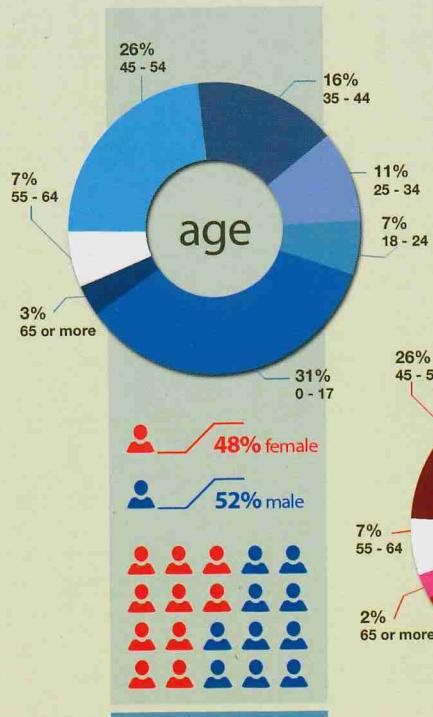
20feet (www.20feet.com)

Social media use by Australians September 2011

POPULATION 21.9M

Facebook 11 million Users

WordPress 2m UVs

YouTube 9.9 million Unique Visitors

Twitter 1.8m UVs

MySpace 930k UVs
Photobucket 700k UVs
Vimeo 390k UVs
Slideshare 220k UVs
Stumbleupon 140k UVs
Digg 100k UVs
Reddit 100k UVs
Foursquare 57k UVs
Delicious 47k UVs

Wikipedia 6.7 million Unique Visitors

LinkedIn 1.8m UVs

Flickr 1.2m UVs

Blogspot 4.6 million Unique Visitors

Tumblr 1m UVs

4m
3.6m
3.2m
2.8m
2.4m
2m
1.6m
1.2m
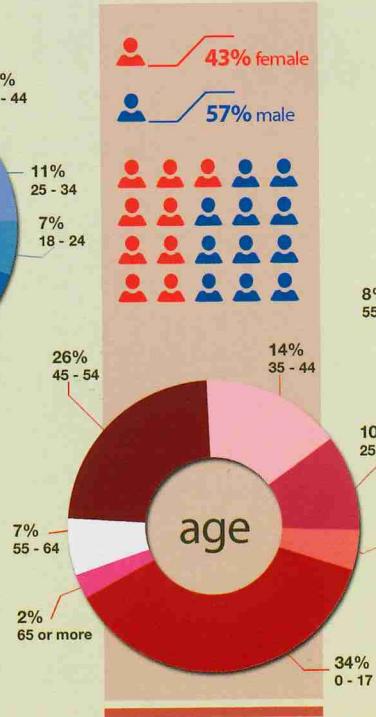800k
400k
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JUN 2010 DEC 2010 JUN 2011

Smartphone Growth

The uptake of 'smart' mobile phones able to access and interact with the internet has rocketed, with purchases of data plans for mobiles tripling in just the first half of 2011. Social media is becoming more mobile, with use of services such as Facebook, Twitter and Foursquare now providing location-based updates.
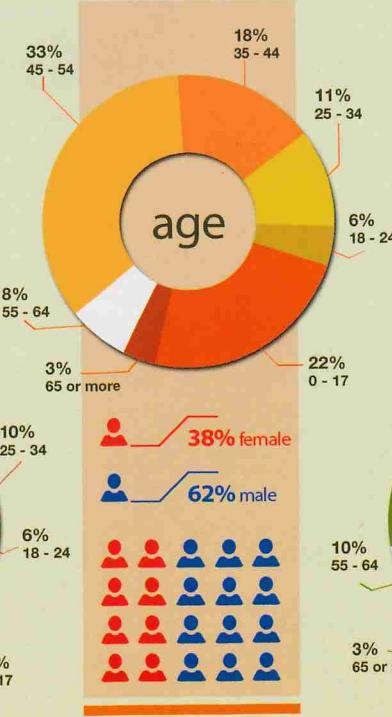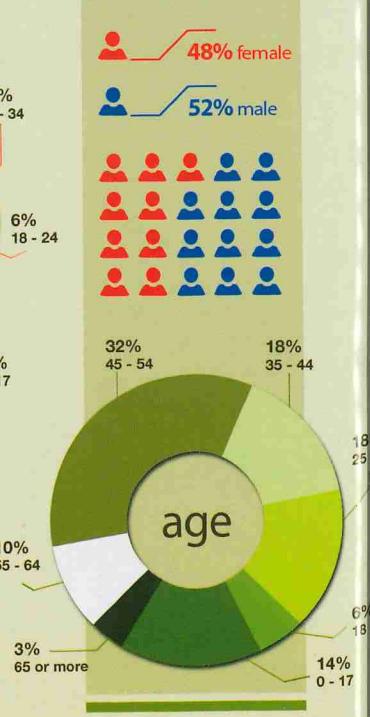
FACEBOOK

age

26% 45 - 54
16% 35 - 44
11% 25 - 34
7% 18 - 24
7% 55 - 64
3% 65 or more
31% 0 - 17

48% female
52% male

YOUTUBE

43% female
57% male

age

26% 45 - 54
14% 35 - 44
10% 25 - 34
7% 55 - 64
6% 18 - 24
2% 65 or more
34% 0 - 17

TWITTER

age

33% 45 - 54
18% 35 - 44
11% 25 - 34
6% 18 - 24
8% 55 - 64
3% 65 or more
22% 0 - 17

38% female
62% male

LINKEDIN

48% female
52% male

age

32% 45 - 54
18% 35 - 44
18% 25
10% 55 - 64
6% 18
3% 65 or more
14% 0 - 17

Data visualisation – illustrate your story with facts

By **Joanna Fulton**, Web & Technology Manager, Philanthropy Australia.

So, we know everyone loves a good story. And today, there are more ways to tell your stories than mere writing. A picture really can tell a thousand words, but it doesn't have to be a photo.

We all get the problem of information overload. They don't call it surfing the internet for nothing: the average attention span for content on a website is five seconds. But what about all that data you've collected? Do you have to write a book to make an impact? You have the story, you have the stats, and you want to get it to a wider audience. You want the funded project to actually have longevity with public support.

Data visualisation is one way to grab that support in a concise, impactful way. Consider that for many of us the most memorable experiences and information are visual – more people are getting their news from television and online video than ever before, and infographics have become wildly popular for those who want to grab information that's easy to understand. It's harder to imagine the enormity of $1trillion US dollars in text than it is when presented with a visualisation like this:

Stacks of $1 notes in comparison to a semi-trailer and person of average height. Source: usdebt.kleptocracy.us

And it doesn't have to be fancy. Here's an example of pure data visualised as an annual report extract, from North Star Alliance (Netherlands):
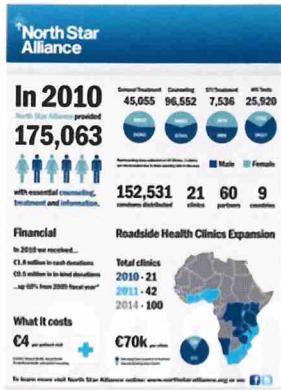
Source: visual.ly/year-review

Word clouds, sometimes called tag clouds, were originally used in blogs to show the most popular or frequent blog topic by the size of a key word in relation to others. This visualisation has now grown to illustrate other mediums.

Here's a popular word cloud from US President Obama's State of the Union address in January, showing the frequency of words used in his address. It's interesting to note that this can communicate not only what Obama's focus was on, but what his speech writers may have been attempting to influence in his listeners' emotional opinion. You could also congratulate Obama on a speech well done with the lack of 'um's.

Source: nymag.com/daily/intel/2011/01/all_america_heard_last_night_s.html

If you've got the resources to be more creative you can try something a bit more fancy. You may have heard of the Girl Effect. Their online video telling the story of an average disadvantaged 12-year-old with hard data, simple imagery and sound. Weigh the impact of this compared with words only and you get the picture.

Source: www.girleffect.org/

And to finish, here's my Wordle.net visualisation of the text from this article. ■

For more data visualisations, check out: visual.ly

The new communication: trust is key

By **Vanessa Meachen**, Director, Research and Policy, Philanthropy Australia.

Philanthropic foundations, like any entity involved in the creation of new ideas and concepts, are in the knowledge business. A common thread in Philanthropy Australia's membership survey is the need to evaluate the effectiveness of funded programs and apply that to further funding decisions, as well as to enhance collaboration with other funders and reduce duplication of efforts. Foundations frequently argue that they must learn from one another's successes and mistakes, to avoid not only re-inventing the wheel but 're-inventing the pothole'. Clearly, communication strategies must form the basis of this process.

Recent studies into how Australia can increase philanthropy make it clear that communication of philanthropy's message is just as key as the creation of tax incentives. The 2008 CPNS study Good Times and Philanthropy[1] suggested improving the visibility of philanthropy, including via the media, as well as improving the public understanding of the not-for-profit sector and of the 'case for philanthropy'. Similarly, the 2010 Philanthropy Australia study into high and ultra high net worth giving[2] recommended a range of strategies including a central point for information about not-for-profit entities to improve donor confidence, and a three-pronged social marketing and promotional campaign to promote philanthropy.

Some see the breakneck speed at which technological capacity has advanced as creating more problems for philanthropy than it solves. Technology has massively increased the amount of information available to anyone with internet access, and has also created the expectation that information will be accessible quickly and cheaply. Google provides access to an infinite amount of data, and cheap tools such as email allow sending of communication on a scale previously limited to organisations with large resources and capacity. The mass media both feeds and rides on the back of our expectations for limitless news, stories and information.

It follows that philanthropy is faced with several communications dilemmas.

Firstly, how do we gain the attention of an information-saturated society in order to tell philanthropy's story and promote its actions?

Secondly, how do we ensure that the increasing expectations of accessibility do not inconvenience our sector?

And thirdly, how can we ensure that we're communicating as effectively as we can in a time-poor sector?

The rise of social media and online communities has led to a range of what community activist Willam Perrin has dubbed "horizontal advice networks". Characterised by the lack of a central authoritative voice, these communities create social capital through individuals providing one another with advice, information and support, "sourced horizontally from peers not vertically dispensed from on high". Thousands of such communities exist, some general and others based around particular topics. Horizontal advice is also provided outside the scope of organised communities, using tools such as blogs and Twitter.

Knowledge online is provided publicly, meaning that if it is erroneous or misleading there is a high chance that someone will see and correct the error, or at the least provide a different point of view. (For example, during the January 2010 flood crisis in Queensland, the Queensland Police Media Unit were able to use the #mythbuster hashtag on their Twitter account to kill misreporting and rumour before it became entrenched[3]). The horizontal nature of online communication and the ease of information flow is a double-edged sword; while it increases the ease of misrepresentation or self-promotion, the level of scrutiny created by many hundreds or thousands of users makes it less likely any player will get away with it for long.

A sector-relevant example of trust and scrutiny occurred when philanthropy wunderkind Holden Karnofsky, co-founder of US-based Givewell[4], misrepresented himself online. Givewell is a charity which evaluates the effectiveness of other charities, and which accepts donations both to cover its costs and to pass on to its chosen grant recipients. Karnofsky registered two separate user accounts at long-standing web community Metafilter – which Twitter co-founder Biz Stone has referred to as "the ultimate group blog", a community of more than 50,000 worldwide users from all backgrounds and professions, with over 25 million pageviews a month. Metafilter is carefully moderated and has a policy against deceptive self-promotion.

Karnofsky used one of his Metafilter accounts to ask for recommendations on charities to support and the second to pose as a different user recommending donations be made to Givewell, without disclosing his association with the organisation. The Metafilter community discovered the deception and several other incidences of Karnofsky recommending Givewell and criticising other charities on other websites without revealing he was the site's co-founder[5].

The incident led to Karnowsky being demoted and disciplined, and was widely reported in news and trade publications including the New York Times and the Chronicle of Philanthropy. More importantly, it led to a wave of mistrust in Givewell by the sector, particularly since Givewell had received widespread publicity for its claim to be "the world's first transparent grantmaker".

Metafilter moderator Jessamyn West summed up in a comment on Lucy Bernholz's blog Philanthropy 2173[6]:

"… if he was a shoe salesman, or someone else involved in the hypercapitalist world of sell sell sell, that would be one thing. He's not. He's involved in philanthropy."

Philanthropy – and indeed the entire not-for-profit sector – is a values-driven field reliant on earning and keeping the public's trust. Charities cannot raise public funds without it; foundations with tax exemptions will struggle to keep them without it; and anyone seeking to encourage and grow philanthropy will be fighting an uphill battle if that trust does not exist.

"We can choose not to participate, but we need to be aware that if we don't take part in the conversation, it will happen without us."

Bradford Smith, president of the Foundation Center in the US, on launching the GlassPockets foundation transparency initiative[7], stated that "the best way to preserve philanthropic freedom is not to hide behind it; rather, foundations increasingly need to tell the story of what they do, why they do it, and what difference it makes… No sector – government, church, business, or charitable – gets a free pass in the world of 24/7 media, blogs, YouTube, Twitter, crowdsourcing, and digital everything."

I'm a passionate believer in philanthropy. I'm also a passionate believer in the potential of new technologies to fulfil our needs to communicate. Having participated in online communities for over 15 years now, I believe that the fundamental thing we all need to understand about social media – and indeed any form of online communication – is that, like all forms of communication, it is reliant on honesty and trust.

So what does this mean for philanthropy and its communication strategies? I believe that it means that we as a sector must be aware that there is a spectrum of communication tools out there, ever-changing and ever-developing. We can choose not to participate, but we need to be aware that if we don't take part in the conversation, it will happen without us. At the same time, we need to be clear that tools should be used not because they seem hip and tech-savvy but because they serve the purpose of communicating our messages and developing our relationships.

We must also be aware that social media has moved ownership of the message away from a corporate marketing perspective and towards individual voices. People are more likely to trust other people than they are to trust 'official' or corporate information sources. As the Queensland Police Media Unit advises, "Rethink clearance processes. Trust your staff to release information"[8].

The message and the human interaction that delivers it is the key. The technology is merely a means to an end; the only way any technological tool will lead to true communication is if the message and the messenger are trusted enough to be heard. ■

1. www.petrefoundation.org.au/docs/CPNS_Good_Times_and_Philanthropy_Report.pdf
2. www.philanthropy.org.au/pdfs/papersreports/PA-High-Net-Worth-Giving-Report-170211.pdf
3. www.police.qld.gov.au/Resources/Internet/services/reportsPublications/documents/QPSSocialMediaCaseStudy.pdf
4. No connection with the Australian Givewell.
5. mssv.net/wiki/index.php/Givewell
6. bit.ly/ncT5Ok
7. www.glasspockets.org
8. www.police.qld.gov.au/Resources/Internet/services/reportsPublications/documents/QPSSocialMediaCaseStudy.pdf

Simon Herd

Simon Herd is Director of Grantmaking Reform at the Australian Institute of Grants Management, as well as a director of The Myer Foundation, The Australian Environmental Grantmakers Network, and The Cranlana Programme. He spoke to **Vanessa Meachen**.

The theme of this journal is communication, and one of its inspirations was the notion that there is a bit of energy in the air at the moment around communication, and particularly through the use of social media. Do you think Australia's philanthropic sector is changing the way that we're communicating?

No. I think at present we are a complete failure at communicating what we do. I think we communicate at a superficial and unhelpful level. The few who communicate who they fund don't communicate why they fund them or what they're funding them to do; and, most importantly, they don't communicate what they actually learned from the exercise, which is an appalling waste of resources and missed opportunities.

Most people who engage in philanthropy – as opposed to a more basic notion of charitable giving – would like to see significant change around the causes that they feel passionate about. However, their lack of communication undermines that commitment. We need to be capturing what works and how things were done.

Every time we fund a new idea, we ask the non-profit to start from a blank page, we ask them to reinvent the wheel. That is a fundamental failure in communication.

So where is it that communication fits in with philanthropy's role?

Philanthropy can't solve everyone's problems. By itself, it doesn't have the resources to solve all of the ills and all of the social issues we face. But what philanthropy can do is to explore new ideas, to capture what works and what doesn't work and to share that information.

I don't know of a single philanthropic entity that is currently successfully communicating what they're learning from their projects.

Do you think philanthropic entities need to communicate with one another, with the not-for-profit sector, with other forms of funding such as government, or all of the above?

All of the above, but in different ways.

One example from the not-for-profit sector, is a project that the Myer Foundation's G4 committee funded a long time ago in South Australia. The applicant wanted money to get local GPs into high schools, to make themselves more familiar to Year 10 and 11 students and let them know what services they provided on a confidential basis. The idea was that those students would hopefully engage in less self-harm and that a whole lot of other health issues would be prevented because young people could feel comfortable talking to their GP.

Now, it sounds like a great idea. But if we only gave them the $30,000 for that project, what would come of that? We might help 300 students over a two-year period, but once the project was over the ideas were going to drop dead. But what about if we helped those 300 students and also got someone to talk to the GPs and the students about what worked, and what didn't work, about how hard the project was to organise, and what were the issues – and actually communicated the concept and the idea more broadly? There would be a chance, then, that other GPs in other areas around the country might pick it up and say, "OK, we've got a basis of an idea, we know what worked there and we also know some of potential the problems to avoid".

Every idea will have a different dissemination channel. The most effective venue for the dissemination of the GP project lessons might be, for instance, the GP newsletter, with a link to a website for those seeking more information. If it's a research project, an academic journal might be the most appropriate channel.

> **"I think there is much in this sector that is taken for granted; there are boards and trusts and foundations that are wholly failing their charter to be doing the most with the resources available to them."**

To my mind, getting the cheque out the door to fund a project may be, if you're lucky, 50 per cent of the work. Actually figuring out what worked might be another 30 per cent of it. This is not about evaluating whether the project is a success or failure – if you focus on taking the lessons of what worked and what didn't work, success or failure becomes irrelevant, because you can still walk away with lessons that other people can benefit from. There is no such thing as a failure, there's just a lesson for other people to build on. The final 20-30 per cent of the work is in actually getting out there and sharing those lessons.

So in answer to your question, Philanthropists have to talk to each other, as we are appallingly bad at communicating among ourselves about how we do grantmaking and how we choose who to grant and all the learnings that stem from our activities. Non-profits also have to talk to each other. To an extent, government is also interested

in what non-profits are doing, because non-profits have to rely on government to fund the big social causes. But really, the focus should be on philanthropy and the non-profits because if you keep nudging the peanut forward, ultimately the case for a particular course of action will become stronger, which will make it easier to source either government or charitable support.

In Australia we tend to look to the US, mainly because the US talk about themselves a lot! We tend to look to them for progress or for answers or so forth. In Australia it's been: hand out the cheque, get a report back from your grantee, maybe in your annual report you talk about some of them, and then it sits on a shelf somewhere.

The report probably took 10s of hours to produce in the first place, it sits on a shelf for three years, then goes to the archive and gets pulped after 10, maybe one person actually read it…

So what we need is possibly foundations to professionalise the way in which they capture and share their knowledge – they need to be putting more resources into that stuff?

Yes, absolutely. I see philanthropy's role as distinct from simple charitable giving, in that it's trying to get at the

hard issues, and looking at new approaches – I think that lots of people claim to be doing philanthropy, and they probably are funding projects that could make a difference, but the decision-makers in our sector are, by and large, failing to capture the significance of those lessons.

Related to that is a failure to realise the importance of having a professional staff – most philanthropists don't acknowledge that grantmaking requires a particular body of knowledge and specific skill set. You cannot necessarily ask the non-profit to honestly capture all of the lessons without professional assistance. There's a whole skill set to do with grantmaking that we need to acknowledge. We need to be handing some power to the people who can make the most of the grants that are going out the door.

I find it fascinating that quite often in our sector people bemoan how slow government is – 'philanthropy is out there taking the risks'. My experience working with hundreds of government grantmakers is that they are so much more professional, so much more structured, they're actually harnessing what they're doing with their grants so much more effectively than philanthropy is doing. They're making long-term commitments, they're looking to pick up the lessons along the way.

Of course, there is bureaucracy, there is masses of wastage in some areas, but by and large the government grantmakers that I deal with – the people who manage those programs – are so much more switched on about how you achieve social change; how you move that peanut forward.

I think many in the philanthropic sector believe they're doing good, and are oblivious to all the things they could be doing better. Largely, that's a product of a sycophancy that exists in our sector – no-one wants to bite the hand that might potentially feed them, and that leads to this delusion of grandeur that is completely unwarranted. It's also self-serving to have a lack of interest in professionalising the sector, because professional staff might tell you that the job you're doing isn't actually as effective as you think it is; that your pet projects have achieved far less than you thought they would.

Sometimes we talk about the gulf between trustees and staff, sometimes it's about the lack of desire to put resources into your staff or to skill-up staff appropriately, but also picking up on what you referred to as sycophancy – that's all about trust. A lot of communication relies on trust – it's about a lack of trust between grantee and grantmaker.

Yes – I think that's a product of having, by and large, a very immature philanthropic sector; a sector that isn't welcoming and doesn't ask for feedback – and that's out of a misguided belief that what we're doing is inherently 'good'. As how on earth can you give away money badly? It's an immature mindset: it's not critical, it's not open to the idea that what they're doing could be done better, and it's blind to the fact that they should be making the most effective use of their funds to achieve the greatest good.

If a charitable donor wants to fritter their money away on small pet projects that aren't going to have any larger impact, that's fine. But for people who

claim to be philanthropists, I find it completely unacceptable. I think there's an obligation on them to make the most effective use of those resources. It's completely unacceptable to keep working in a manner that doesn't look to maximise philanthropic resources.

And you cannot maximise those resources without having professional staff, those who can actually identify those opportunities that are going to have the greatest chance of generating useful lessons that others can build on, that have the skills to properly manage the grant, and that can have a respectful and honest dialogue with grant recipients. I think there is much in this sector that is taken for granted; there are boards and trusts and foundations that are wholly failing their charter to be doing the most with the resources available to them.

Something else that's related to that – there is some cynicism and mistrust of philanthropy, donors and the charitable sector at large. There's been a suggestion that the forthcoming charities commission will help address that in some way; but it's also been suggested that foundations shouldn't be administered by the commission. Separating out foundations and NFPs – do you think that having a central register of charitable entities is going to raise the trust of the public and help us? It's been suggested that the commission hold a register of best practice, that it help train up NFPs in measuring their impact.

The charities commission is a very good idea – to have non-profits put their financial records and whatnot in a publicly accessible place is right and proper because the public has a right to see that information – the public, at a minimum, invests 30 cents in the dollar in these organisations because they don't pay income tax. Putting this information in the public domain allows you, at a minimum, to do some interesting analysis, and you may also be able to detect some bad apples through that disclosure.

> ## "Change has to happen now – in the next five to ten years the model of how philanthropy is done must be completely revolutionised."

Having said that, I have some scepticism that having that information on the public record will make it simple to judge whether a non-profit is good or bad, effective or not effective. Should the new commission branch out into best practice and be a teaching organisation? I would say no, because I don't think government should define what is best practice.

And they say, well the best practice is for a charity to have an admin ratio of less than X% then everybody will be –

Right. ASIC doesn't decree what is best practice for business. It does decree what is good governance, so ASIC has a role in setting the minimum standards, but it certainly shouldn't be going beyond that ambit.

Turning to whether foundations should be under that banner – absolutely. They're a non-profit organisation that's gaining a public benefit; the very least they can do is to announce to the world that they exist and provide basic information. I think it would also be fantastic if every foundation had to disclose its financial reports.

If foundations or philanthropic entities complain that if they're listed they'll be bombarded with applications, well that's just a failure of their grantmaking processes. The grantseeking community, much to the surprise of some in the philanthropic sector, is by and large very intelligent, and if grantmakers communicate clearly what it is they fund and how they go about choosing their funding recipients, grantseekers will listen. For those that don't, you can have a pro forma letter that says thanks very much, but you're not who we fund.

If organisations don't want to be on that register, then don't seek a public benefit. There is nothing to stop people setting up foundations that don't have DGR status, that do not seek income tax exemption, that are not fettered in any way by the ATO. There is a whole range of choices out there.

So one of the things we've talked a little bit about is trustees and do you think one of the greatest barriers is the lack of willingness to put the resources into them?

Absolutely. Again, it comes back to the central misconception that some people have – *how can we possibly give away money badly? Giving away money is a good thing; we give money away; therefore we are good.* It is such false logic.

To date, there's been no significant pressure to challenge trustees on the status quo of how grantmaking is done. If, in 2050, all that we have is an increased philanthropic sector that is operating in the same way it does today, but 10 or 20 times larger, then we as philanthropists, and as those that care about how philanthropy is conducted, will have completely failed. The number of missed opportunities that will have existed – the failure to actually have achieved significant change in the areas that we care about, will be enormous. We will have set up another thousand foundations that will operate in the same manner they do today, and that's just unacceptable.

Change has to happen now – in the next five to 10 years the model of how philanthropy is done must be completely revolutionised. We have to accept that there is a role for professional grantmakers, that the cheque out the door is, at most, 50 per cent of the work. All of that has to change, because there is going to be a enormous influx of funds into the sector – we've already seen it in the past 10 years with the number of PAFs that have been created. The model of how philanthropy is done has to be rewritten so that we do not replicate the staid, blinkered ivory

towers of the past. That's casting no value judgement on what those ivory towers have funded, but on *how* they fund. We have to revolutionise how grantmaking is done.

How can we do that? How can we as a sector, as individuals, as anyone who's reading this now – what can we do as a sector to ensure that change comes about? And then what should PA be doing about it?

The first step is to acknowledge that there is a body of knowledge around grantmaking – that grantmaking and grantmakers have a distinct set of skills, and those skills can be learnt. Much as a lawyer can be trained to be a lawyer and a doctor can be trained to be a doctor, there is a distinct set of skills that can be taught to grantmakers.

We need to put money into doing the research to identify that body of knowledge, to start to codify what it is, and what skills a good grantmaker can bring to it. We need to be far more discerning about who we recruit into positions within foundations. Just because you are a great artist does not mean you will make a good arts grantmaker. There is domain knowledge around a certain area, but by and large we should begin rewriting the job descriptions to say "If you wish to work in this foundation you need to have certain skills, or you need to be willing to acquire those skills".

It's about professionalising the sector – and there are steps being taken to do that. Here at the Australian Institute of Grants Management (a division of Our Community), the Grantmaking Toolkit we've put together is starting to codify what is a typical grant life cycle. People say that everything in philanthropy is distinct, that no two grants are the same, that you can't give a prescription on how to do philanthropy, that you can't map out how that is done. I say that's rubbish. There is a standard grant life cycle – looking at the ideas, looking at the application, deciding how you're going to assess it, how you're going to

notify people, making the decision, making the payments, progress, etc. – that is codifiable, and there are skills and knowledge that can be learnt that will aid delivery of a grant program. The idea that philanthropy is above that, that it is a mystic art, is rubbish.

What is mystic and distinct and interesting about philanthropy is having the ability to decide what issue you are going to choose to tackle, and setting the broad parameters around where you want to focus. The privilege and the distinction of being on a board of a foundation, or being a philanthropist, is that you get to point the ship in the right direction. But once you've done that it's up to the captain and the sailors to deliver that mission as effectively as possible.

So we have to acknowledge the body of knowledge, we have to think about and revise the job descriptions, we have to look to the universities such as Swinburne and QUT to make sure they are teaching and making available skilled graduates that can fill these positions. Looking five to 10 years down the track, we need to have built the grantmaking profession. In the same way that we have with accountants and lawyers, we need professional standards and certification for grantmakers.

Philanthropy Australia could be a great body to do that but the problem with PA is that the grantmakers that you look at may be only one-twentieth or less of the total pool of grantmakers in the country; there's so much grantmaking going on there outside of the philanthropic space. So I think we need a body such as AIGM to be the certification body and I think the role of PA should be to advocate and help lift the bar within the philanthropic sector, to push the notion that there is such a thing as a professional grantmaker, to give guidance on what skills and what knowledge they should have, to help lobby for the creation of that standard within 10 years, and to work with others to get it there.

So if you could have one wish – or three wishes – if you could mandate one change or wave a magic wand to create one change to traditional philanthropy and how they're working now – what would it be?

My one wish is for better communication. If I could have one thing it would be that every project that is funded captures what works and what doesn't work, and that that information is made publicly available. I don't care if it's a little youth theatre group in Geelong or a tree planting project in country NSW; we are so lacking as a sector, as a broader not-for-profit sector, in models of how to do things, we need to stop asking people to fill in the blank page.

So if I could change one thing it would be to force the dissemination of what works and what doesn't work. If you look at those things from a prism of learning for the long term then the notion of success or failure falls away. There are just lessons. We also have to acknowledge that this takes resources, that the best people to do this are probably foundation staff, and they need the skills to do it. ■

The communications conversation

By **Avalee Weir,** Communications Manager, The Ian Potter Foundation, The Ian Potter Cultural Trust and The George Alexander Foundation.

Philanthropy Australia invited me to comment on the rise of communications managers in the Australian philanthropic sector. But before I do, I should profess a vested interest: I am one. In fact, as far as I am aware I am the only one; certainly the only one working in a dedicated communications role*. Although, I am only part-time.

I guess it is a start. Yet the world is now waist deep in an information revolution: communication is more accessible than ever – and public expectations about access to information are higher than ever. So why are professional communications staff still such a rare breed in Australian philanthropy? Is it fear of being inundated with applications and enquiries? Concern about what might be perceived as unseemly self-promotion? Or maybe it comes down to lack of operating funds for these staff positions?

"In the broader context there has been a paradigm shift in the way we communicate. The one-way street has been replaced with a multidirectional highway. No longer is it about persuasion or provision of information, we now communicate to share, to learn, to engage and even to mobilise and empower."

All of these may be factors and they are legitimate considerations, or at least they have been in the past. But I think the tide is about to turn. Despite the lack of dedicated communications *managers* per se, communications is on the agenda, part of the conversation – and increasingly, part of job descriptions. PR and marketing consultancies are on retainers; seminars and information sessions are on the rise. The proliferation of social media has certainly contributed to this and it may be that general growth in the sector is also promoting greater sophistication. Perhaps the prospect of increased transparency requirements has prompted the trusts and foundations to look at what they are saying, how they are saying it and, importantly, who is listening and what they might say. Regardless, I think this trend is both exciting and positive.

In the broader context there has been a paradigm shift in the way we communicate. The one-way street has been replaced with a multidirectional highway. No longer is it about persuasion or provision of information, we now communicate to share, to learn, to engage and even to mobilise and empower. In this

context there is no philanthropic trust or foundation that doesn't need to communicate. It is certainly not the exclusive domain of larger trusts and foundations.

Communications is all about advancing your organisational purpose. Whatever your trust or foundation's objectives, history and interests, good communication – communication that supports your organisation's *raison d'être* – always improves outcomes for your stakeholders, both internal and external. And that's true even when all you have to say is, 'applications are closed'.

Coming to philanthropy after 20 years in consumer brand communication and corporate social responsibility, it took me a while to get to grips with the fact that philanthropy is a distinctive sector – a place where competition, branding and most other traditional marketing concepts have a different type of relevance, if they are relevant at all. The sector is uniquely placed to do things on its own terms and at its own speed. But to ignore or underestimate the opportunity that good communication brings to develop the sector, to improve and enhance grant-making and indeed, the impact of grants, would be a mistake.

As philanthropic communicators we are not going to send a blimp up over the MCG or pull off publicity stunts in Federation Square. In this sector, communications is about keeping it real, genuine and authentic, acting thoughtfully and with purpose.

Effective communications helps to build understanding, knowledge, relationships and community around an organisation. Even if you have no desire to become a household name or make the next Australia Day honours list, strategic communication – especially two-way communication – will improve applications, support grant-making decisions and help achieve organisational objectives.

Of course this first requires knowing what you want to do and why you want to do it – and that is true whether you are setting out a whole communications plan or just setting up a Facebook page to help you stay in touch with your stakeholders. The first step is to stand back, reflect on your organisation's mission and consider how communication can help you achieve that, the second is to set specific, realistic and measurable objectives.

When I began at The Ian Potter Foundation in 2008, the role started as a list of tasks: annual reports to be written, speeches to be drafted, newsletters to create. All this was - and still is – important, but we needed to step back and think about what it was that we wanted to achieve with these tools. Over time, communications has become an integral part of our strategic planning and thinking at the management level. The tasks have become the tools we use to communicate our key messages and not as an end in themselves.

Singer Merlyn Quaife performs at The Ian Potter Music Commissions finale event at the Melbourne Recital Centre.

The grand finale event for The Ian Potter Music Commissions 2009. The publicity program leading up to the event received a State Award for Excellence (Arts) from the Public Relations Institute of Australia.

The Ian Potter Music Commissions presentation event in 2009. Guest speaker, Jonathon Mills; Lady Potter AC; artistic director of the event Damian Barbeler; judge Richard Mills AM; winner of the Established Composer Fellowship, Gordon Kerry and winner of the Emerging Composer Fellowship, Iain Grandage.

We work to a communications plan that sets out objectives which are tied to The Ian Potter Foundation's funding principles, the objectives of each program area and key communication opportunities or 'reasons to talk' – such as major grants, anniversaries and new initiatives. The Foundation produces a regular e-newsletter, a Facebook page and there is much more in the pipeline, including publicity support materials for grantees. There is no doubt that the communications of the Foundation have helped to put it on the front foot and given it a new voice. A good example of this is a publicity program we ran to reinvigorate interest in The Ian Potter Music Commissions for their tenth and final year. The program succeeded in increasing applications by 100 per cent (and the quality increased in tandem) as well as extended national media coverage. The program was executed with the help of PR agency Tsuki and received a Public Relations Institute of Australia 'Golden Target Award for Excellence' (Arts).

The immediate opportunity for most philanthropic organisations, no matter their shape or size, is to be found at a grassroots level, where two-way communication – made possible largely by new social media platforms – offers a chance to tell, to listen, to ask and to learn. At this stage there is only a handful of trusts and foundations communicating in this space but I suspect this too is about to change. The 'Three Eggs' philanthropy blog, www.3eggphilanthropy.com, which was founded by three passionate philanthropy program managers, including two of my colleagues at the Foundation, is a great example of the dialogue that is unfolding in the sector.

In the USA's large and sophisticated philanthropic arena, most of the larger trusts and foundations have communications represented at the board or director level. Several have whole departments dedicated to communicating their own programs

and many are set up to support and evaluate grantee communications. There is a national peak body for philanthropic communicators (www.comnetwork.org). Over 500 US foundations have a Facebook page, 300-plus are on Twitter and hundreds use YouTube, LinkedIn and a raft of other social media platforms. As a whole, this communication contributes to a much more mainstream presence for philanthropy in the US and helps to keep it on the radar and on the agenda for the media, government and the wider community.

Now more than ever before, communication is accessible and affordable, but it must be undertaken with thought, with purpose and ideally, with a plan – which is where some professional advice can be very beneficial. So I hope I will not be a rare breed for much longer. If our shared vision is that Australia's philanthropic sector should grow and flourish, and if we want to increase public recognition of its contribution to the community, strategic communication offers a huge opportunity for the sector and will enhance and add further value to all the important work it does. ∎

* In private philanthropy

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