

*Executive Vice
President's Report*

Assessing Foundation Communication Activities: Obtaining Feedback from Audiences

John E. Craig, Jr.

Ford Foundation president Susan Berresford, writing in the *Chronicle of Philanthropy*, recently observed that a challenge in today's changing philanthropic landscape is "the increased expectation that foundations demonstrate their results to the public. As private bodies acting for the common good,

foundations should show results to justify the public's trust and their special tax status." She goes on to point out that journalists, especially those who cover philanthropy, seem to "recognize this and increasingly seek evidence of success"—or presumably failure. Still, she argues, "pressure to show results is healthy and challenges us to be clear about markers of progress and results when we speak to broad audiences," concluding that "large and small foundations must make communications a priority." While the wisdom of the argument is clear, communications has not been a strong suit of foundations historically, and those launching new initiatives need to develop strategies and means for assessing their effectiveness.

The Commonwealth Fund is one of a growing number of foundations paying serious attention to placing new information, developed through grants, into the hands of those able to use it to improve society. In keeping with the principle that a spirit of inquiry is central to assuring a foundation's performance, the Fund conducts a number of activities to examine the effectiveness of grants and programs, interactions with grant applicants and grantees, and communications regarding the Fund's work. This year the Fund sponsored a thorough assessment of its communications activities, the results of which may be of interest to others proactively engaged in communicating the results of their work.

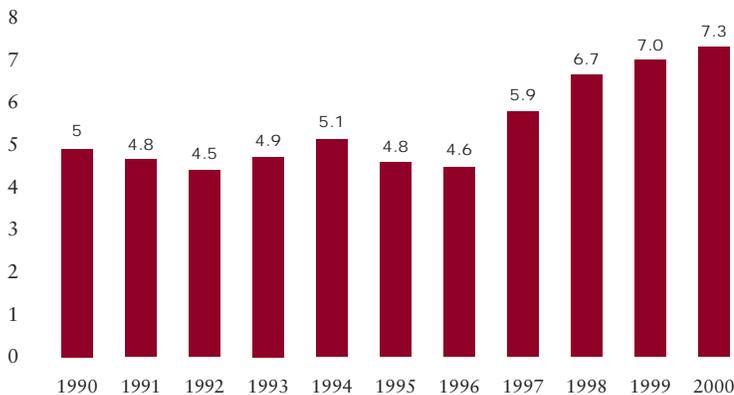
COMMUNICATING WITH FUND AUDIENCES

The Fund places great emphasis on assuring that the results of grants—whether aimed at generating information for policymakers and practitioners or at bringing about concrete improvements in the financing and delivery of health care—are communicated effectively. This policy derives from recognition that foundations that commit themselves to analyzing issues and identifying best practices, testing new service programs, and preparing future leaders in fields where improvements are needed have essentially put themselves in the “information business.” The Fund has instituted a variety of practices whose aim is to create a steady flow of information contributing to the improvement of health care policy and practice:

- Grant agreements include clearly specified communications deliverables, such as papers, possible journal articles, and meetings. Fund staff work closely with grantees to assure the timely development of those products.
- The Fund’s communications staff and budget have been augmented to assure that publications are produced, events occur successfully, and journalists receive alerts to new reports and quick and authoritative responses to requests for information.
- An in-house publications program enables timely circulation of new findings that might not appear promptly in peer-reviewed journals; at the same time, a Fund-based peer review system assures quality control of those publications.
- Targeted mailing lists have been developed to facilitate reaching the right people with the right information.
- The Fund’s web page has been developed and progressively improved to serve as a major means for reaching important audiences.
- *The Commonwealth Fund Quarterly*, with Recent Grants inserts, has been developed to enable more rapid dissemination of the results of Fund-sponsored work and the foundation’s

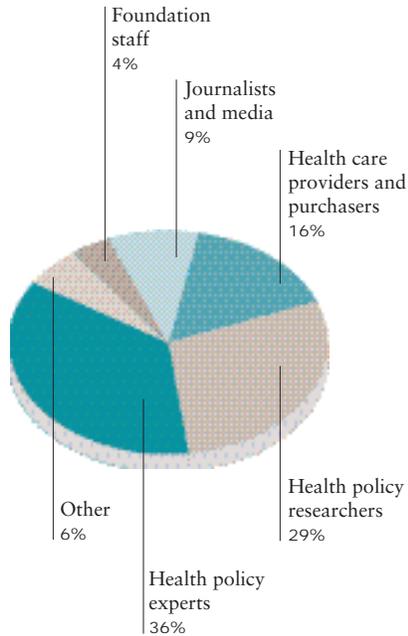
The Commonwealth Fund now commits over 7 percent of its budget to communicating findings and lessons from its work.

Percent of Fund’s budget for communications



Views on the Fund's communications efforts were obtained through a mail survey of a cross-section of targeted audiences.

Percent of respondents



funding interests.

The results of these activities are many. In 1998–99, Fund publications numbered 60 (including the *Annual Report*, analytical papers, issue and policy briefs, fact sheets, survey reports, chart books, and quarterly newsletters); peer-reviewed journal articles numbered 22; Fund-sponsored work and authors had approximately 360 citations in the national press; Fund work was highlighted on 88 occasions on television and radio programs; and the Fund's web site had approximately 69,8000 visits, an average of 5,800 each month. In addition, the Fund sponsored 39 forums for expert audiences, and Fund staff and grantees participated in numerous con-

ferences and provided expert testimony to a number of legislative bodies and national commissions. The Fund's communications budget now totals \$1.8 million, or 7.3 percent of total annual expenditures.

SURVEY OF FUND AUDIENCES

The Fund receives many positive comments about the volume and quality of its communications efforts. Even so, the Fund's board of directors and staff decided this year that a formal assessment of the program, aimed not only at judging the effectiveness of current activities but also at identifying areas for improvement, would be timely. Toward that end, the Fund commissioned a survey of Fund audiences by the Alpha Center, a Washington-based research firm, in early 1999. The study's components were a written survey, mailed to a sample (1,328 individuals) of the Fund's primary mailing list, and structured interviews with 22 health policy experts, 10 journalists, and 14 researchers who had authored Fund reports.

Detailed questions solicited information on the quality and usefulness of the Fund's publications and meetings, the effectiveness of the Fund's strategies for reporting and disseminating its findings and activities, and the Fund's contribution to health policy and improving health care access. All respondents were promised that their feedback would not be attributed to them as individuals. Obtaining responses on the mail survey

proved challenging, even though the survey recipients were from the Fund's primary target list. With considerable effort, an overall mail survey response rate of 41 percent was achieved—sufficient to yield reliable results. The interviews were conducted by telephone. Among those polled, journalists proved particularly difficult to reach, as a number of news organizations have restrictions regarding participation in audience surveys.

AUDIENCE SURVEY FINDINGS

Summarizing the results of their field work, the Alpha Center research team reported that Fund audiences have a positive opinion of the foundation, and that the Fund's work is seen as policy-

relevant, well-written, and accessible. Journalists view the Fund as a reliable, credible, and useful source for health policy information. One said, "I always look at [Commonwealth Fund reports] because...I can trust what they've produced." One expert summarized the Fund's contribution as "definitely at the top, a good organization giving money to good people who do good work."

Encouragingly, the Alpha team found that most respondents see the Fund as being in a league with other top organizations in its field. Among policy experts, authors, and the media, most know at least one member of the foundation's staff and consider that person to be very knowledgeable.

Fund Publications

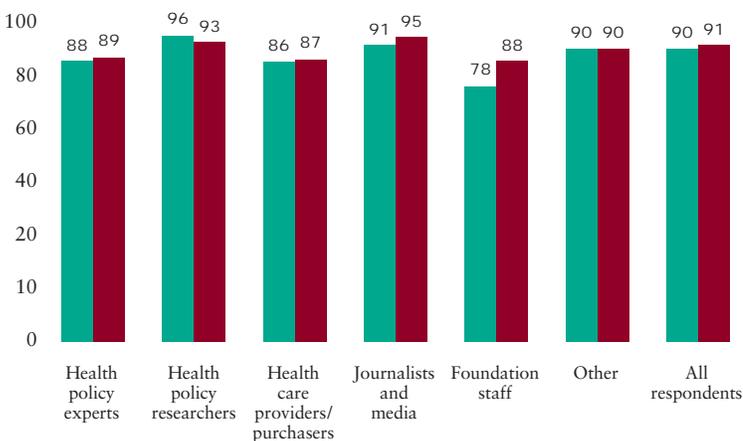
The Fund issues or sponsors a variety of types of publications, ranging from analytical reports on health policy issues to fact sheets and press releases. Predictably, different audiences found different publications to be most useful. Analytical reports and policy and issue briefs on health care topics were generally rated as most useful, but both long and short documents were found to be critical in the dissemination of Commonwealth Fund research.

The majority of readers skim executive summaries of reports and major headings to determine if the work is relevant to their interests. Many mentioned using charts, data, and text from longer reports

Among the Fund's publications, analytical reports and issue/policy briefs on health care topics are most in demand.

- Analytical reports
- Issue/policy briefs

Percent rating publication as "very or somewhat useful"



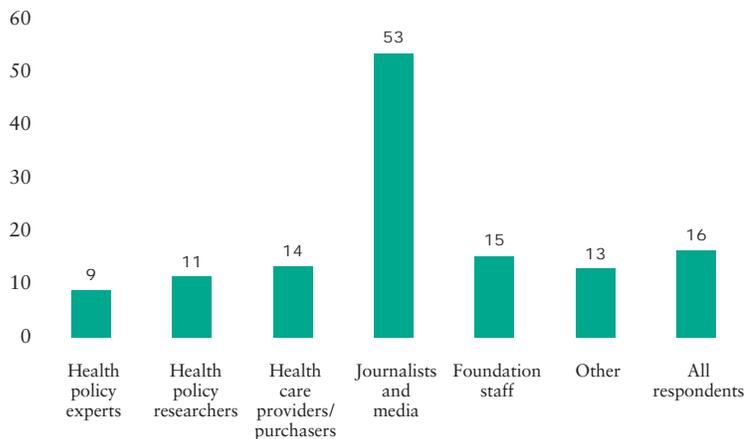
in their work. Most keep the longer reports and chart books for reference. All respondents are more likely to skim longer reports and to read issue briefs and fact sheets more closely. For longer reports, respondents see executive summaries and briefing notes as critical. Most are far too busy to read an entire report, unless it is specifically relevant to their current work. Busy people appreciate anything that helps them navigate a document quickly to find what they need: an executive summary, charts and tables mingled with text, clear subheads, and other aids.

The Commonwealth Fund Quarterly and press releases were found to be least useful to respondents overall. Journalists and people who work in communications firms find press releases helpful, but most others either do not receive them or skim and discard them. Although respondents deemed the *Quarterly* less useful than other Fund publications, it was seen as valuable by staff members at other foundations.

Most recipients said that the results of Fund-sponsored research are presented at the appropriate technical level—neither too basic nor too technical. Views on the format of Fund publications were overwhelmingly positive, and helpful suggestions were made for improvements: use less text and more tables; integrate charts, tables, and text into the body of the document, rather than placing them in less accessible appendices; and

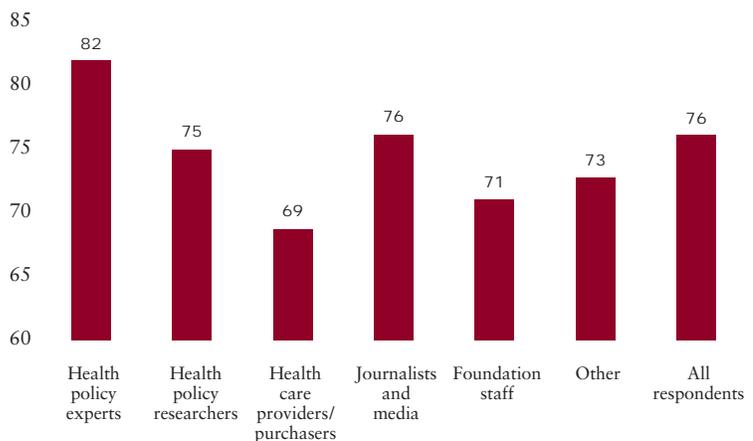
Press releases command little attention from most of the Fund's target audiences, but they are valued by journalists.

Percent rating press releases "very useful"



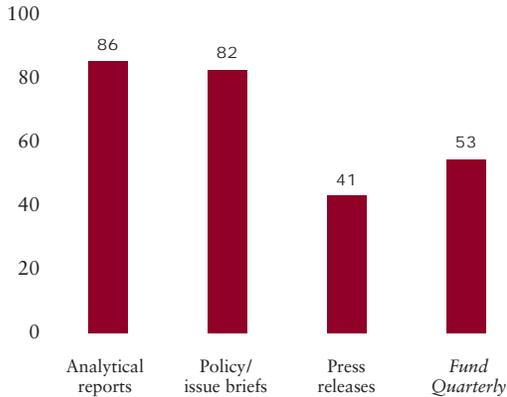
Striking the right balance between too technical and too basic is important for reaching audiences with the results of Fund-sponsored research.

Percent rating Fund analytical reports technically appropriate



Knowing which publications actually reach people's desks and draw their attention can help target potential users for particular documents, formats, and topics.

Percent of all targeted audiences recalling receiving documents sent to them



increase font size, both to meet the needs of baby boomers' eyes and to make documents easier to copy or fax.

Several policy experts mentioned that Fund publications are not as slick in their formatting and production as those of some other organizations—a characteristic they viewed as positive and indicative of appropriate use of resources. This perspective was shared by respondents to the mailed survey, of whom only 15 percent said they would be more likely to read Fund publications if they had more attractive covers and formats. Several respondents mentioned that the use of color, while attractive and inviting, makes it impossible to copy charts to distribute to staff or use in presentations. Several policy experts also commented that they appreciate that all Commonwealth Fund documents look similar, so readers can immediately tell

who published them.

With respect to distribution, most health care policy experts seem content to be on the general mailing list for all documents, except press releases. The majority wished to continue to get all reports, rather than run the risk of missing something of interest. Yet some respondents to the mail survey suggested a more targeted mailing list. Information gleaned from the study about which publications actually reach people's desks and catch their attention indicated the importance of targeting publications to the specific interests of users.

The relative merits of distributing Fund work through peer-reviewed journals or as Fund publications were discussed with both health care policy experts and authors. The policy experts were evenly divided on the importance of peer review. Some see publication in peer-reviewed journals as enhancing the credibility of the work, while others expressed frustration that the peer-review process slows down the dissemination of important research findings. Noting that peer-reviewed journals generate more trade and mainstream media attention than do foundation-supported publications, authors doing research for the Fund suggested placing a higher priority on peer-reviewed publication of researchers' work.

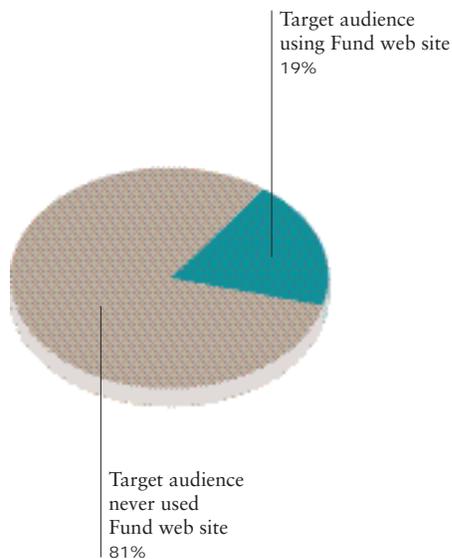
Fund-Sponsored Meetings

Health care policy experts were the only audience asked about Commonwealth

Fund meetings. Most respondents attend a fairly large number of meetings, often to make presentations but also to network and learn about new research findings. Surprisingly, given the number they attend, the vast majority consider meetings to be a poor use of their time.

Overall, respondents were somewhat less familiar with Fund meetings than with its publications. Those who had participated in Commonwealth meetings gave them generally high marks, saying that the Fund brings together highly qualified people, is relatively balanced, and does a good job of selecting topics and speakers on important issues. There was a preference for interactive meetings rather than lecture formats, and for smaller meetings of no more than 2–4 hours.

A relatively small portion of the target audience uses the Fund's web site, although most say they would value receiving e-mail alerts about new publications.



Internet Applications

As it turns out, most respondents are not heavy users of the Internet—although some have staff who are—and only a portion of Internet users are familiar with the Fund's web site. Most of those who are familiar with it find it useful, and a number see the web as increasingly critical to dissemination. A majority of health care policy experts, journalists, and respondents to the mailed survey said they would definitely or probably sign up to receive e-mail alerts from the Fund about new research findings and reports.

The Alpha authors found that, while there was encouragement for the Fund to continue to refine its web site and make reports available electronically, the majority of the foundation's target audience is more comfortable with hard copy reports. As more people become comfortable with the Internet, however, a larger percentage of the Fund's audience will likely access its web site and expect it to be state of the art.

Media Presence

Respondents are largely in agreement that The Commonwealth Fund lacks a strong media presence—a perspective shared by health care policy experts, journalists, and authors. However, policy experts are evenly divided in their opinions of the importance of such a presence. Half believe that the work supported by the Fund needs media visibility, but that the foundation itself does not. Some think that the Fund

should do a better job of ensuring that the media disseminates its work. Others see the pursuit of media coverage as at best unnecessary and at worst dangerous.

Journalists and authors, in contrast, see a greater media presence as very important. Journalists consistently said that Fund experts are very accessible and responsive. They also said, however, that Commonwealth studies would achieve more coverage if the Fund were more proactive in notifying journalists by telephone when important new reports are being released, encouraged more press and Congressional briefings to raise the visibility of the Fund's work, and recommended that the Fund issue press releases whenever its research is published in a peer-reviewed journal.

RECOMMENDATIONS RESULTING FROM THE SURVEY

Part of the Alpha Center's assignment was to advise the Fund on how it could improve its communication and dissemination strategies, based on the feedback from audiences and the recommendations of a communications expert who reviewed the findings, focusing particularly on the Fund's Internet and media strategies. The recommendations include the following:

Publications

- Continue to disseminate important research findings quickly through Fund publications, but raise the priority of publishing work in peer-reviewed journals.

- Balance work on policy debates of the day with longer-term research to ensure that Fund work will have lasting as well as immediate value.

Web and E-Mail

- Continue to develop the web site, as it will become an increasingly important dissemination vehicle. At the same time recognize that the majority of respondents use the Internet in limited ways and rely heavily on printed documents that come across their desks. Do not consider the web site to be a substitute for hard copy reports.
- Develop a system of e-mail alerts about new research publications and upcoming meetings, but avoid inundating recipients with messages.
- Develop cybermarketing strategies, including links between the Fund's web site and related web sites, to increase the Fund's outreach to policy-makers and health care providers, particularly at state and local levels, who may not be familiar with the Fund but would find its work valuable.

Targeted Mailing

- Improve targeting of mailings, especially press releases and *The Commonwealth Fund Quarterly*.
- Augment efforts to maintain up-to-date mailing lists, and take further steps to identify the particular

interests of those on the list.

Media

- Produce more reports closely linked to breaking news stories.
- Be more aggressive in promoting important or timely reports. Make “alert calls” to reporters when a very topical report is about to be released and give advance notice of a major report linked to an ongoing national policy debate.
- Increase contacts between the Fund’s president and key national media representatives to encourage attention to specific reports, using meetings, overnight mail, and broadcast faxes of press releases and report summaries.
- Provide journalists with a source list of contacts, by subject area, of articulate and well-informed grantees and staff.

Meetings and Forums

- Continue to focus meetings on particular topics, but consider using interactive formats, inviting small groups of participants (no more than 40–60), and scheduling meetings for short periods of time (2–4 hours).

A BASIS FOR IMPROVEMENT

The Alpha Center report concluded that Fund audiences hold very favorable perceptions of the foundation, its work, and its communication and dissemination strategies. The Fund is viewed as

being appropriately strategic, given its resources, and is seen as contributing to important health policy debates through research and analysis. According to the Alpha Center team, these strengths give the Fund a strong basis for enhancing the impact of its communications efforts.

The report is already having an influence on the Fund’s communications activities. We are taking to heart suggestions regarding the preferences of readers, the distinctive needs of different audiences, the habits of journalists, more advanced uses of the Internet, and other practical matters.

A recent study conducted for the Urban Institute Center on Nonprofits and Philanthropy found that “many foundations are seeking to change their relationship with the media and the public in general. Many have strategic communications departments that are looking to new technologies, like the Internet, to expand their ability to communicate with the public. Others are seeking to reshape themselves as important sources of information, including hard data on some of the most pressing social issues of our time.” For foundations engaged in generating and disseminating information, the Alpha Center study indicates the value of periodically touching base with core audiences. Audience feedback can be an enlightening source of new ideas for assuring strong foundation performance.