Marketing Your Knowledge

A Report to Philanthropy's R&D Organizations

Developed with and for participants in the David and Lucile Packard Foundation *Knowledge Project*

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From R&D to Market

Sharing What Works

How are good ideas circulated in philanthropy?

The question is on the minds of many in the field. And it gets to the heart of a Packard Foundation effort to help ten organizations share what they know with greater impact. This report aims to shed light on this challenge, providing ideas on how these ten groups, and others in the field, can better share and spread knowledge of effective practice within philanthropy.

Knowledge is understood here as any research findings, critical lessons, innovations, new information or ideas relating to effective practice. *Within philanthropy* is defined here to mean staff and boards of foundations, individual donors and/or philanthropic associations.

The ten organizations participating in the project have treasure troves of research findings, reflections on practice, and good ideas to offer the field. But they face a gauntlet of obstacles in delivering that knowledge to practitioners who could use it. Some obstacles come from the structure, incentives and culture of philanthropy. Others come from a tradition of poor communications practice by the sector's purveyors of knowledge, whether foundations or nonprofit groups.

To counter these obstacles, purveyors of new ideas in philanthropy need to step beyond the typical dissemination approach. Instead of "dissemination," they should start thinking "from R&D to market." Under this model, the ten project participants can be understood as belonging to the research and development (R&D) arm of philanthropy. In turn, the process of sharing what they know can be understood as taking their knowledge "product" to "market" — in other words, as a process of marketing their knowledge. The most effective efforts to share knowledge in philanthropy follow this marketing model. In particular, they employ ten practices to ensure their new ideas are used by practitioners, practices explored in the pages that follow.

To prepare this paper, Williams Group interviewed a dozen individuals who work in philanthropy and are regarded as opinion leaders and information gatekeepers in the field: Lucy Bernholz *(Blueprint R&D)*; Marty Campbell *(The James Irvine Foundation)*; Rob Collier *(Council of Michigan Foundations)*; Jody Curtis *(Foundation News & Commentary)*; Carla Dearing *(Community Foundations of America)*; Andy Goodman *(a goodman communications)*; Jan Jaffee *(GrantCraft)*; Barbara Kibbe (independent consultant and former *Packard Foundation* program director); Penelope McPhee *(Knight Foundation)*; Ed Pauly *(Wallace-Reader's Digest Funds)*; Edward Skloot *(Surdna Foundation)*; Sterling Speirn *(Peninsula Community Foundation)*; Nan Stone *(Bridgespan Group)*; Tim Walter *(Association of Small Foundations)*. We have interspersed their observations throughout this paper. We also drew on our own work over the past five years helping philanthropic organizations develop communications programs. Finally, the paper was informed by our emerging work with each of these groups and is designed to supplement that work.

Good Knowledge, Bad Sharing

The Problem

Why is knowledge sharing so poor in a field that is so knowledge-rich?

Over recent years, philanthropy has invested time, money and energy in generating new ideas and research on what works. Foundations spend millions on program evaluation and research. "Knowledge management" has taken its place among the field's buzzwords. And many call philanthropy "society's R&D," so vast is its capital of experiments and lessons as a potential source of innovative solutions to societal problems. The challenge the field now faces is how to spread that knowledge. Indeed, some argue that philanthropy's R&D function exists to *spread* knowledge as much as it does to *generate* knowledge.

Obstacles to a healthy circulation of ideas.

When it comes to circulating new ideas, philanthropy suffers from a serious case of clogged arteries. Many of the practitioners we interviewed consider knowledge sharing in philanthropy to be in dismal shape. A number of obstacles—in norms, structure and practices—stand in the way of a healthy circulation of new ideas, innovations and lessons in the field. Some of these obstacles are systemic. Others are caused by poor practice and can be changed.

"If we spent every dollar implementing well the things we already know are effective, we'd be much better off. So much of our work is about finding innovative ways to share knowledge of what works."

"We're doing a horrible job as a field sharing what we know. We're simply not reaching enough of the market."

"How can philanthropy function as society's R&D when it has so much trouble turning its own R&D into improvements in practice?"

Systemic Factors

Incentives and structure. According to many practitioners, the incentives of philanthropy don't encourage players to openly share knowledge or even seek it in the first place. Likewise, philanthropy's structure—fragmented, highly decentralized, hardly standardized—makes it difficult terrain for circulating new information. Finally, limited professionalization and a low supply of practice standards rob philanthropy of some avenues used by other industries to share what works.

"The field is fragmented, and there are few established ways to convey effective practice. And you don't get paid or rewarded for doing better."

"In contrast to the for-profit world, where knowledge is everything, in our sector, knowledge has no real value. It doesn't make you more successful. It may not differentiate you or increase your salary or make you more competitive. There aren't many rewards or incentives driving practitioners to share knowledge."

"There may be affinity groups, but we're not a networked field."

Norms and culture. At least three aspects of the norms and culture of philanthropy block a robust circulation of knowledge.

First, some practitioners might seek to *share* their knowledge, but the majority are far less likely to *use* the knowledge of others. As the cause, some cite an undercurrent of competitiveness, a bias against ideas or practices "not invented here," especially—and ironically—among foundations.

"It's parallel play, like two-year-old kids at a playground. Foundations play next to each other but don't interact. They haven't matured to the point where they play with each other."

"Foundations want to have something to call their own."

"We suffer from an egocentrism that needs to be fixed for more sharing and networking to happen."

Second, the field suffers from amnesia. On top of a "not invented here" syndrome, there's a "not invented today" bias, making it unusual for practitioners to consult the history of even their own institutions for ideas on good practice.

"The field doesn't know its own history. Most practitioners know nothing about philanthropy's historical roots and why it works as it does. We might know public education history but not the history of funding public education."

Third, much of philanthropy tends to avoid bad news in its communications.

"There's a tendency to put a positive spin on everything and to publish a lot of puff stuff."

"Most publications simply don't tell you the real story."

Problems in Practice

Some obstacles to knowledge sharing can be found in philanthropy's structure and norms. Yet poor communications practices—on the part of foundations, associations and R&D organizations—are just as often to blame. These problems in practice may be traced to the prevailing "dissemination" model of sharing knowledge and the approaches that flow from it. The dissemination model offers a scattershot approach to spreading knowledge: toss seeds to the wind and hope something will grow. The pattern goes like this: We have knowledge. We identify potential recipients. We send it to them.

"We throw stuff onto the water and see what floats."

Three particular aspects of this approach limit its potential impact.

Knowledge supply vs. knowledge demand. The typical dissemination strategy runs into trouble by focusing on the supply side of knowledge sharing, rather than the demand side. There's an implicit assumption in the dissemination approach that, as the saying goes, "if you build it, they will come." The dissemination model tends to begin with the question: *What do we have to say?* What's notable is how the demand side of knowledge sharing—those practitioners who might potentially use this knowledge—is so rarely part of the equation. Knowledge purveyors should instead ask: *What knowledge do users need?*

"Too often our model is to put out everything we know and see if people find it useful."

"There's a lot of push, but I'm not sure how much pull there is."

A flood of isolated monologues — and a trickle of conversations.

Information access vs. informed action. The typical dissemination strategy also stumbles by implicitly assuming that learning and change happen once information is broadly transmitted and made widely available. Look at most efforts and you'll detect the tacit idea that a one-way, one-time broadcast of information—for instance, a report on research findings, sent to an undifferentiated mailing list—is sufficient to spread knowledge. Such broadcasting, or "unilateral self-publishing," as one practitioner put it, has become a dominant practice in philanthropy. The result may be that more information about good philanthropic practice is available than ever before. Yet this self-publishing practice has generated a flood of isolated monologues—and a trickle of engaging conversations. Our discussions with those on the demand side of knowledge sharing—grantmakers and others—suggest that the most significant changes in their understanding and practice come less through *absorbing* information than through *applying* it, whether through conversations with peers or using new ideas to improve ongoing work. Rather than spread knowledge a mile wide and an inch deep, R&D organizations would do well to target the desired practitioner actions that their knowledge could inform.

"An information dump isn't knowledge sharing. Twenty people having a conversation at a brown bag lunch is knowledge sharing."

"Knowledge in people's heads is static. Knowledge in group action is dynamic."

One-time products vs. a long-term, continuous process.
The dissemination strategy often falters by ending knowledge sharing efforts after a one-time product distribution. Send out a report (and/or post it on a website), and wait for practitioners to learn. This describes much of the practice we see today in philanthropy. The reality is that lasting improvements in practice, adoption of innovations, and increases in understanding all happen gradually. In turn, to support such changes, knowledge sharing needs to be a steady, strategic and long-term process.

"The problem with most of our communication is that it's an unfocused and single-shot application. A huge amount of information is spit out at one time, and it gets buried."

An Alternative Model: Knowledge Marketing

The marketing model begins with users and ends with use.

The most effective efforts to share knowledge typically follow a model that differs significantly from the dissemination approach. These efforts employ what we call "knowledge marketing." Under this model, the organizations participating in the Packard Foundation Knowledge Project can be thought of as belonging to the R&D arm of the sector, and the process of sharing knowledge can be likened to taking their products to market.[1] Products that are effectively marketed are developed, refined and framed to address the needs of specific groups of potential consumers; are widely understood and valued by those consumers; are effectively distributed to those consumers; and are used by those consumers. In this way, marketing is a demand-focused discipline. Knowledge that is effectively marketed follows the same model: developed with specific groups of users in mind, designed to address their needs and problems, delivered in ways that reach those users, and ultimately applied by those users.

We define knowledge marketing as *a continuous process of understanding a set of users and developing and delivering knowledge that they can use to solve problems and improve their practice.* In contrast to the dissemination model, the marketing approach focuses on demand for knowledge, seeks to enable informed action, and sees knowledge sharing as a long term, continuous process.

The marketing model begins with users and ends with use. Effective knowledge purveyors in philanthropy's R&D arm see themselves not only in the knowledge *generation* business but in the knowledge *use* business. Effective efforts treat

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[1] The word "marketing" encounters some resistance in philanthropy, but we should clarify that marketing is not "selling." As management expert Peter Drucker has argued, the aim of marketing is to make selling superfluous—to know users so well that the service "fits them and sells itself."

knowledge less as an end in itself and more as a means to improved practice. They focus strategies on the kinds of practitioner changes—in actions, behaviors and attitudes—that new knowledge can help to enable. In turn, they apply user-centered communications to carry out these strategies.

Later in this paper we provide a six-step framework that can be used to develop knowledge sharing efforts. Next we consider ten practices our research has identified which fit this model—practices that work.

Dissemination Model	Marketing Model
Focuses on **knowledge supply.** *(What do we have to say?)*	Focuses on **knowledge demand.** *(What knowledge do users need?)*
Seeks **information access** as the goal. *(How can we ensure that our knowledge is widely available?)*	Seeks **informed action** as the goal. *(How can we ensure that our knowledge is widely used to improve practice?)*
Typically approaches knowledge sharing as **one-time products.** *(How can we package and deliver our knowledge in a product?)*	Approaches knowledge sharing as a **long-term, ongoing process.** *(By what process can we ensure that our knowledge is absorbed by practitioners?)*

Ten Practices That Work

Our research identified ten approaches to knowledge sharing that have proven effective.

ONE:
Effective efforts solve problems or address needs faced by practitioners.

In order to be used by practitioners, knowledge must connect to practice. That's why a problem or need focus is a key ingredient in the proven recipe of the *Harvard Business Review* and other successful business knowledge publications. According to Nan Stone, former editor of *HBR* and now a partner at the Bridgespan Group, ideas that address real problems that real people face have the greatest currency in management publishing. Connecting knowledge to real issues in everyday practice is the way to address the "tree falling in the forest question," as one respondent puts it—the challenge to make your knowledge matter.

One of the best examples of an innovation that spread through the field by solving practitioner problems is logic modeling, an increasingly popular practice for program design and evaluation. In the late 1980s, when several foundations were beginning to fund comprehensive community initiatives, they soon recognized how difficult such initiatives are to evaluate. Existing evaluation methods made it hard to identify cause-effect relationships between long-term, big scale initiatives and desired community outcomes. Logic modeling was then introduced as a better method for charting progress toward interim and long-term outcomes. Logic models provided a roadmap of these initiatives, highlighting the appropriate sequence of activities, identifying strategies for achieving outcomes, and providing a common frame of reference for program officers and evaluators alike. The logic modeling practice spread "because the old models weren't working well," says one respondent. "It solved a problem."

"Knowledge producers should develop their research strategies by first asking 'What are the unsolved problems?' and 'Where can my work make a difference?'"

"Information is context specific, and it doesn't have value until it is made available and delivered in a context-specific, time-specific and needs-specific way. This is especially true for most grantmakers, who aren't professional information seekers. You're not producing information; you're producing answers. And you have to specify what the question is."

TWO:
Effective efforts begin with user segmentation.

Segmentation—dividing a market into groups according to different variables—is an important component of the marketing discipline. It is especially relevant to knowledge sharing in philanthropy because of the way the field is divided into various subfields. The broader the target group, the more likely knowledge will have to be pared down to its lowest common denominator. The narrower and more defined a target audience is, the easier it is to address the practical problems its members face—and to make knowledge stick. A segmented field requires segmented communications.

"In philanthropy, sharing knowledge is much more connected to subfields than to the field as a whole."

"Recognizing the strata of the philanthropy market is so important. You can't go to a meeting of the Association of Small Foundations and talk about a practice at the Ford Foundation. They won't listen. You have to talk about an example from a small foundation. You have to make the point: 'this is what it means to you.'"

"We have the hardest time disciplining ourselves to pick a niche and write something for that niche. It is extremely time-consuming, and people resist it. But it's important."

THREE:
Effective efforts are based on market research.

Once user groups are segmented, the next step is to learn about them. Some form of market research—a process of interviewing representatives of target user segments about their information needs—should be a staple of every communication plan. But it's part of very few. Many R&D groups in this sector tend not to solicit needs and feedback from philanthropy's practitioners as often as they should. For those that do, market research can help ensure that their knowledge is useful and used.

"The discipline of asking the people whose needs you want to meet whether your work is worth anything to them and how it could be made more useful is extremely powerful."

"The question we all have to ask is: 'So what?' Who would find this information useful and why? You need to be able to answer that, especially the 'why.' In a world where there's so much competing for people's attention, why would they want to stop and learn this? Too often it's 'I know something and I think it's really interesting.' But you have to ask, 'Would other people find it interesting?'"

Since 1991, *Foundation News & Commentary* has surveyed a sample group of readers after every issue, asking them to go through that issue's table of contents and check which stories they read. It's a simple but effective methodology, allowing the publication to understand which kinds of stories readers find the most useful.

Carla Dearing of Community Foundations of America suggests that knowledge producers take advantage of the market research capacities of philanthropy associations and affinity groups. For example, she says, Community Foundations of America could test research topics with a group of community foundation users to see if there is demand.

The Wallace-Reader's Digest Funds learned about the importance of market research the hard way. After doing a comprehensive evaluation of a school library program they had funded, they were ready to release a report. But

prompted by the thinking of researcher Thomas Backer*, they decided to first determine what target audiences wanted. They hired a market research firm to make blind calls to school library supervisors and superintendents, asking the question, "If there were more information on making school libraries more effective, would you use it and how would you use it?" The surveyed librarians responded that they wanted the information, but the superintendents—who control the districts' action agenda—weren't interested if the changes wouldn't increase test scores. Realizing that neither the project nor the study was done around test scores, they decided to do a modest distribution of the report, and to rely on the American Library Association's follow-up work to anchor the new approach in the field's standards, rather than having the foundation make a major pitch for large-scale adoption. Market research is now standard practice at the Wallace Funds.

"Knowledge entrepreneurs need to get good at understanding demand for knowledge and preferred ways to access it. It wouldn't be hard to create feedback loops to understand what foundations want."

"In doing market research, you need to figure out how foundation practitioners will talk about unsolved problems. You'll get too concrete an agenda if you simply ask: What do you want from us? It's better to ask, 'What kind of legacy do you want to leave?'"

FOUR:

Effective efforts tap peer-to-peer networks as distribution channels.

Our research found that many knowledge entrepreneurs in philanthropy get and give their most useful knowledge through peer-to-peer networks. These networks are both formal—such as affinity groups and trade associations—and informal. Knowledge flows so well through such networks for two reasons. First, peer-to-peer networks tend to spread knowledge in the form of practitioner conversations rather than through the more static broadcasting of information. Second, by being peer-to-peer, such networks ensure that knowledge has a connection to practitioner problems and needs.

For Sterling Speirn of the Peninsula Community Foundation, peer-to-peer conversations have proven one of the most reliable sources of new knowledge. In particular, he mentions an annual meeting of the CEOs of the 40 community foundations with the largest asset sizes. Speirn cites a number of reasons why this meeting has become such a font of good ideas, but one in particular is the requirement that each CEO provide reflections on the year and share them with the other CEOs in advance of the meeting.

Foundation News & Commentary learned from surveys that readers prefer to read articles written by their peers. Once *FN&C* began to publish first-person reflections and commentary by practitioners, readership rose. One strategic lesson from this preference is that efforts to change practice are more likely to succeed if they are championed by practitioners, rather than R&D or consulting organizations. This can be a tough idea to absorb for professionals whose success rides on the recognition of their intellectual capital.

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* President of the Human Interaction Research Institute, www.humaninteract.org

"Peer-to-peer groups are where the action is in philanthropy."

Our research suggests a significant overall finding: Philanthropy's R&D organizations (the "knowledge wholesalers") have not developed enough partnerships with the peer-to-peer networks of the field, potential "knowledge retailers" such as trade associations and affinity groups who can repackage knowledge and deliver it in a more context-specific, personal and interactive way.

Retailing knowledge through peer-to-peer networks represents a rich and relatively untapped opportunity. Regional associations are a great distribution tool and information gatekeeper, says Rob Collier of the Council of Michigan Foundations, which networks its members in person and online. According to Tim Walter of the Association of Small Foundations (ASF), retailing knowledge is a key part of what ASF does. Walter believes that because associations such as ASF look at materials through the eyes of their members and market, they, rather than R&D groups, are the right ones to package and share knowledge of effective practices.

"Foundation folks will listen to their peers. As a field, we need to use peer networks more efficiently than we have in the past."

FIVE:
Effective efforts target opinion leaders.

Within peer-to-peer networks, certain individuals tend to be opinion leaders—people who provide knowledge and influence to a broader group of practitioners in the field. In our research, we interviewed individuals who fit this profile. Jan Jaffe of GrantCraft, for example, always has a dozen articles with good ideas and research findings that she gives to others with whom she meets. Sterling Speirn of the Peninsula Community Foundation is always on the lookout for good stories about effective practice that he shares in speaking with various community foundations, other colleagues, and his staff. Independent consultant Andy Goodman uses a monthly newsletter, *Free Range Thinking,* not only to share his own research and ideas on nonprofit communications but to showcase the knowledge of other experts. Goodman also emphasizes that within many foundations there are such opinion leaders, people who see it as a priority to capture knowledge for others as well as push it out to the world at large.

We asked these individuals about the points during their work process when they are most likely to search for new knowledge. In light of who they are, perhaps their answer was not surprising: They are most likely to *consume* new knowledge when they are looking to *share* new knowledge with others—through speeches or presentations they make, papers or columns they write, meetings they organize and lead. They constantly search for new ideas and practices to not only make their own work more effective, but to share such knowledge with others in the field. This yields a subtle but important lesson for knowledge producers in the field—that in addition to enabling target consumers to *use* knowledge, they need to also equip these users, especially the opinion leaders among them, to *share* knowledge. This means finding opinion leaders among target user segments. It means packaging knowledge in ways that can be easily recycled. For knowledge generators, it also sometimes means giving up a sense of ownership in those cases when it is better for opinion leaders to be the champions of new knowledge.

"Entrepreneurs aren't inventors—they look for ideas that others might have created and take them to market."

"The people I rely on are good at connecting with others and at building a knowledge base openly. They don't treat knowledge like copyrighted materials."

SIX:

Effective efforts start with small conversations and move outward.

Knowledge producers need to be strategic about where they start. Many efforts appear to falter not only because they haven't identified and researched user groups, but because their early communication strategies are too broad. Starting small and moving outward is the idea at the heart of the so-called "viral marketing" strategies that have taken such good advantage of e-mail and other new technologies. Picture a spiral starting from a single point and spinning slowly outward. Successful efforts often follow this path, beginning by spurring small conversations with key practitioners.

Focused, early conversations can catalyze the broader spread of knowledge by engaging early adopters of an idea or innovation. In philanthropy, reaching early adopters can have an impact because of a pronounced leader-follower dynamic in the field. For example, one change in philanthropy practice over the last decade, according to Blueprint R&D's Lucy Bernholz, is the rise in the number of foundations with communications offices. There are a number of possible factors contributing to this trend, but what particularly strikes Bernholz is the fact that a group of leading foundations visibly created communications offices, and others soon followed suit. With enough early adopters of a practice innovation, critical mass—the point at which enough players have adopted an innovation that "an innovation's further rate of adoption is self-sustaining"[2]—can be achieved.

Former *Foundation News & Commentary* editor Jody Curtis traces many of philanthropy's innovations to small initial conversations among practitioners. To stay on the cutting edge of changes in philanthropic practice, Curtis says she has frequented the breakfast roundtables at the Council on Foundations annual conferences and other conversations in which the seeds of innovation are sown. Over time, she says, most of the new ideas she has reported on were initially discussed at these roundtables or other such small conversations.

An example of the "starting small" strategy, as well as of good user segmentation, comes from one of the participants in the Packard Foundation Knowledge Project. Patti Patrizi is managing the "Improving the Practices of Philanthropy" project, which will publish a series of monographs on various practices in the field. Patrizi says she started out thinking that the monographs needed to reach a total of about 3,000 foundations, but gradually realized that they really needed to reach a core of closer to 100 foundations. Each monograph, in turn, will need to reach a subset of individuals from that core. Even the project's beginning target was an improvement over the strategies of the many knowledge sharing efforts in philanthropy that simply target "the field." This is akin to the faulty strategic reasoning behind communications campaigns—some of which are launched by foundations—that seek to reach "the public." By seeking to reach everyone, these campaigns will hardly reach anyone.

[2] Everett M. Rogers, *The Diffusion of Innovations,* p. 313.

"What gets people to pay attention is to get personal. You need to start with an immediate circle of people and permeate. Most usually do the opposite: They start with the macro and hope it will get to the micro."

"Any idea that matters needs to be seen as a living, acted-upon piece of knowledge creation and not an edict. You have to hit small conversations."

SEVEN:
Effective efforts create and capitalize on learning moments.

Tim Walter of the Association of Small Foundations encourages knowledge creators and their funders to focus as much on the moment at which learning takes place as on their research. He likens this to the dual skills of professors: research and instruction. Of course, Walter acknowledges that it's easier to have an engaged learner in an academic setting, where students are captive and grading acts as an incentive for attention and learning. By contrast, the busy practitioner who wants to get better at foundation work has less time or incentive to be such an engaged learner. Still, learning moments do exist for philanthropy practitioners. Our research has identified four: peer interaction, transitions, timely issues, and doing.

Peer interaction. The main way that the Association of Small Foundations works to create such learning moments is to hold meetings where practitioners among foundations of similar size can interact. Another illustration is the evolution of ASF's "Foundation In A Box" project, an online collection of more than 2000 pages of materials developed by leading foundation writers and advisors for use by ASF members. Recognizing that members learn best in conversations with other members, ASF is taking the project into a next stage—using peer-to-peer interaction to better transmit the knowledge. The first step is to take the 2000 pages of materials and organize them according to the real-world management questions they can help answer. The next step is for members to volunteer to be responsible and available to take questions from other members about a particular set of questions. For instance, if a member wants to learn the best way to hire a consultant, he or she will be able to call another member who has had experience in hiring consultants, and the two can look online at relevant parts of the "Foundation In A Box" website together. The system—like a customer help line for members—combines learning from a comprehensive online collection of written materials with learning from the real-world experience of a peer.

Transitions. Learning moments are especially ripe for institutions, programs and people in transition. Practitioners report that they tend to be the most interested in new knowledge when they are transitioning into a new job or when their foundation is transitioning into new program or new management approaches. In periods of transition, before routine and inertia have set in, people are the most open to new ideas and suggestions. Both Marty Campbell of The James Irvine Foundation and Ed Pauly of Wallace-Reader's Digest Funds emphasized this point, saying that their most productive learning happened when they first started a job, were designing a new program, or were completing an important project and sharing its results. As evaluation directors, Campbell and Pauly have also found that colleagues within their own foundations—

grantmakers with whom they frequently share new knowledge—are likewise most open to new information during times of change. Knowledge producers should therefore look for board, leadership and staff transitions as prime time to inject knowledge. They should also remember that there always exists a mass of new practitioners in any segment, a set of users ready for perennial topics to be revisited.

"You need to understand the constraints facing grantmakers– the tyranny of getting money out the door, quality grants done, relationships done. Foundation practice becomes a set of hoops they jump through. But grantmakers do often find themselves in the position of learning a new field or project, and it's at this moment, when they're temporarily pried out of these constraints, that they often learn the most."

Timely issues. Creating and capitalizing on learning moments requires knowledge producers to be opportunistic—to track the zeitgeist of the field and be ready for times when their knowledge is most needed. One example of timely and opportunistic knowledge sharing was a report written by Andrew Blau and published by the Surdna Foundation titled *More than Bit Players: How Information Technology Will Change the Ways Nonprofits and Foundations Work and Thrive in the Information Age.* Surdna's Edward Skloot says that a big reason that 5,000 copies of this paper have been circulated is that it was timely on a subject—technology—that people were curious about.

Nan Stone says that *Harvard Business Review* found that many readers would save the magazines and then look up an article when they faced a problem it addressed. There will be times when the knowledge that R&D groups have to share may be especially useful to practitioners, and those times may not coincide with when the pertinent knowledge is published or distributed. Tactically, this means that knowledge has to be made available to be "pulled" by users when they need it. It also means that knowledge producers must be ready to "push" their knowledge when the moment is ripe. In other words, they need to have an editor's antennae. Editors track their readership and understand when issues are of the greatest interest and relevance.

"These days, when the 'need to know' light bulb goes on in a donor or practitioner's head, there's no one centralized place to go. One of the key issues facing the field is that there are no organized archives or searchable and updated databases that collect all the knowledge that's being generated and make it available when it's needed."

Doing. Perhaps the best learning moment is the act of doing. Simply put, people learn best by doing. The spread of logic modeling as a practice, cited earlier as an example of effective knowledge sharing through solving practitioner problems, also happened because it was a discipline and framework that could be *used*, not just *understood*. The lesson for philanthropy's R&D organizations is

to translate knowledge into applicable tools: frameworks, instructional materials, worksheets, illustrative case studies—anything that allows practitioners to apply knowledge to the particular circumstances of their own work.

EIGHT:
Effective efforts shape knowledge products using three techniques.

Up to this point in the paper, we have emphasized the strategies that effective efforts have employed to share knowledge. But product is important as well. Here we identify three techniques that have been used to produce and present content with impact.

Clear messages. Effective knowledge sharing efforts are anchored by a clear and consistent set of key messages or points. In a society flooded with information, message development is a critical—and often neglected—step in developing the content of effective knowledge sharing efforts. One example of effective messaging is how the consulting firm Blueprint R&D has worked to persuade its clients and other philanthropy practitioners to think of philanthropy as an industry. For more than five years, the group has pushed this industry framework, says Lucy Bernholz, and it appears to be taking root. At first, she encountered resistance, but gradually support for the idea has grown. One key to the success of this effort, according to Bernholz, is having a clear and memorable message. Another, she says, is ensuring that the message is rooted in practical meaning for practitioners—showing why it matters to them.

Provocative arguments. Ideas that provoke and rattle cages tend to spread quickly in philanthropy, according to Barbara Kibbe, formerly of the Packard Foundation. The trick, she says, is to get keepers of the status quo to react but not dismiss. Jody Curtis says that some of the most widely read articles in *Foundation News & Commentary* have been similarly provocative. One example Curtis cites was a *FN&C* cover story called "Best of the Worst Practices," written by Bruce Sievers and Tom Layton, about the top ten ways grantmakers annoy grantseekers.

"This field is more cagey and polite than others. When you are honest and blunt, people notice."

Memorable stories. Andy Goodman suggests that philanthropy is rich with stories, but is failing to capture and share those stories. Goodman says that stories give the knowledge they illustrate a life of its own because people tell memorable stories and these stories get circulated and recirculated in the system. This idea might be increasingly understood, but it is not yet widely realized in practice.

"We don't need more white papers and monographs. We need more stories."

NINE:

Effective efforts deliver knowledge using short and simple formats, as well as "push" and "pull" methods.

Delivery format and method have a significant impact on whether practitioners pay attention to knowledge.

Short and simple formats. Keeping it short and simple is an important yet often overlooked guideline. What holds many R&D organizations back, says Rob Collier of the Council of Michigan Foundations, is that they produce tomes that overwhelm readers. In distributing knowledge pieces to its members, CMF has developed a practice of creating three- to five-page "highlight pieces" that distill the main findings of larger reports. Busy executives need a way to quickly review a report to determine if it is useful to them. In short order, summaries need to answer the "So what?" question. In surveys, *Foundation News & Commentary* has learned that readers want short and simple formats.

"People don't want long pieces.There are so many smart people in this field who have a tolerance for reading a lot. But shorter really is better. We live in a nation of skimmers."

"The ten organizations participating in the Packard project do very good work, but they often put out an overwhelming volume of stuff. People wonder, 'How am I going to digest this?'"

"We all write too long. We need simple executive summaries that have legs. In most reports, you have to read too far to understand the relevance to your own work, to see why it is significant."

Push and pull methods. Using "push" and "pull" strategies can allow knowledge producers to be both simple *and* comprehensive. Here's the formula: push information to people using short, simple and catchy summaries, then show them where they can pull additional information. Many groups are now using push and pull strategies. E-mail newsletters or research summaries, for example, lead with simple blurbs, then provide links to more information on websites. Push and pull approaches take advantage of Internet technologies— of e-mail's ability to get attention and of the web's ability to allow users to access information when they need it.

"There's a resistance to what people fear is 'dumbing down.' But the good news is you can have it both ways. You can summarize and then lead people to more information."

A good case study for push and pull communications using Internet technologies—and one that also illustrates the notion of knowledge sharing as a multi-step process, not a one-time product—is Community Foundations of America's approach to sharing knowledge. To provide its members with knowledge that it or others have commissioned or generated about effective practices, CFA employs four means of communications. First, they put studies, ideas and other resources on their website. Second, they publish a regular e-mail newsletter containing short summaries and links back to website content. Third, they conduct online discussions about various community

foundation issues in which participants call a toll-free number and are taken through downloadable PowerPoint presentations or other content on the website. CFA has found that these discussions provide great ways to do informal market research to determine the level of member interest in various knowledge topics. Fourth, they hold face-to-face discussions at meetings sponsored by regional associations of grantmakers.

TEN:
Effective efforts share knowledge using multiple means to build appetite and reinforce messages.

This practice echoes two ideas central to the knowledge marketing model: that knowledge sharing should be considered a gradual and strategic process, not a single event, and that a major ingredient in that process is plugging into practitioner conversations.

Building appetite. By "building appetite," we mean informing target users about knowledge early and often, and well before any final product is released. If the first time users hear about an idea, research project, or innovative practice is when they encounter the final product, they are less likely to absorb it. Opening up a knowledge project to key users early on is a good way to do market research. It also jump-starts the practitioner conversations that knowledge producers seek to fuel. And it is a form of prototyping, of offering up emerging knowledge and letting users influence its development. In his book, *Serious Play,* Michael Schrage cites the example of Microsoft providing "beta-version" prototypes of Windows® software to thousands of beta-testers worldwide. The practice saves the company millions of dollars in costs, leads to significant product improvements—and, in the process, creates a relationship with users and builds an appetite for more. In philanthropy, interim briefings and beta-testing knowledge are good ways to build appetite.

"Interim briefings can be incredibly powerful. You put the ingredients on the table but the recipe hasn't been cooked yet. Foundation people will come to these briefings. They use the information, and it creates a conversation in the field."

Message reinforcement. The challenge to knowledge producers is not only to develop a set of clear messages about their knowledge products, but to continually reinforce those messages using various communications vehicles. One example is the oft-cited 1999 *Harvard Business Review* article "Philanthropy's New Agenda: Creating Value," by Michael Porter and Mark Kramer. A number of factors contributed to the article's wide readership, including its packaging, the power of the *HBR* brand, the power of the Michael Porter brand, as well, of course, as the article's substance. Another ingredient in its success, according to the Knight Foundation's Penelope McPhee, was a multi-step process of distribution and reinforcement, seminars, appearances at conferences and a number of follow-up products.

"A lot of the challenge is to get the message out using a number of vehicles and over a long time horizon."

Developing Strategies to Share Knowledge

A Six-step Framework

One: Define the problem or need. What practitioner problem, need or question are you addressing? Why is it significant? What are the primary causes of this problem? In what ways does your knowledge—or could your knowledge—help address it?

Two: Identify, segment and research the market for your knowledge. What groups of users will use your knowledge? Why do you believe they will use it? What are the best ways to divide these users into segments? How are these target users experiencing the problem? One effective technique used in creative briefs for advertising is to describe target users, their attitudes and how they experience the problem—all in their own words (or your approximation of their own words). This approach helps you to empathize with your audience and is more likely to contain emotions, metaphors and mental models than the more typical third-person description.

Three: Develop use objectives. What do you want target users to do differently as a result of this knowledge? How can your knowledge be applied by target users to address the problem or need? How can your knowledge inform desired action? Effective knowledge marketing is user-centered and action-focused. The more concrete and measurable your objectives are, the better. Many efforts make the mistake of jumping right to products—for example, "we'll package our knowledge in a report and a PowerPoint® presentation." By first focusing on action-oriented objectives, you'll avoid this mistake and ultimately make it more likely that your knowledge will get used.

Four: Develop a process through which your knowledge will be used. What methods will help you achieve your objectives? Is your knowledge alone going to cause the action/change you desire? Does it need to be distributed in conjunction with other partners/channels for change to achieve its objective? A typical user might undergo four stages[3] in absorbing and using knowledge: awareness ("I am aware that this idea/innovation/information exists"), persuasion ("I have a favorable attitude toward the knowledge"), decision ("I have decided to use the knowledge"), and use ("I actually use the knowledge in my practice"). A helpful technique is to develop scenarios that specify how target users go through all these stages—or any other stages you might specify. The strategies you develop here will identify products to be developed—reports, presentations, and the like—but only as steps of a broader process for achieving your objectives.

Five: Develop your knowledge products. How should you frame, focus and package the content of the knowledge you are sharing in order to achieve your objectives and reach your target market? What are the key ideas and pieces of information that will anchor all of your communication efforts? What are the main ways your knowledge can help users address the need or solve the problem? What's the best way to organize, format and say it so it will engage your target users? Note that we suggest developing products only after specifying process and not before, as the process you identify will determine the format and content of your knowledge products.

Six: Assess your progress. How will you assess whether your knowledge has been used and objectives have been accomplished? How will you assess whether your knowledge has had an impact on practice? What other practitioner problems and needs have you identified through this process?

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[3] Adapted from *Diffusion of Innovations* by Everett M. Rogers

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