



**Center for  
Strategic Research  
and Communication**

[www.researchandcommunication.org](http://www.researchandcommunication.org)

# Helping Businesses Align, Scale and Measure Philanthropic Initiatives



Center for  
Strategic Research  
and Communication

## The Center for Strategic Research and Communication (CSRC)

is a 501 (c) 3 nonpartisan, nonprofit organization that helps clients create positive and lasting social change initiatives. We develop cost-effective solutions that help clients to be more strategic and therefore more effective. CSRC conducts research and strategic planning, develops messages and materials, uses traditional and new media, and develops business and community partnerships to build client initiatives that enhance the quality of life for all.

CSRC developed and managed the implementation of a number of successful philanthropic initiatives that address many social issues, including healthcare, equitable access and achievement in education, diversity and race relations, and equity and inclusion in the workplace and boardroom.



## CSRC'S APPROACH TO HELPING CORPORATE PHILANTHROPY

CSRC has firsthand experience identifying national and community needs that can benefit from philanthropic efforts and the expertise to manage the challenge of aligning these needs with business models and strategic goals. Effective philanthropic efforts are a two-way street – while working for the common good, businesses and benefactors benefit from the philanthropic relationship. CSRC ensures that philanthropic efforts result in measurable and sustained social change, while obtaining recognition, or other direct or indirect benefit for business. To have a lasting impact, philanthropic programs should be designed, launched and marketed like any other business product or line of services.

The CSRC model for philanthropic program alignment, expansion and measurement encompasses a cyclical pattern of analysis and action. Each action informs the next, resulting in decisions that are grounded in knowledge and experience. The components of the model are: focus, strategy, support, review and advice.



### ● Focus: Identifying Your Audience and Researching Relevant Issues

The first step in any strategic initiative is to understand the marketplace. This step considers how company priorities align with issues on the global and national agendas or with the pressing needs of communities. We begin by working with our clients to determine if the “cause” is aligned with company’s priorities and business objectives.

Then, CSRC conducts initial research that encompasses literature review, media audit and in-depth interviews with key stakeholders. In addition, if necessary, we conduct a series of listening sessions such as focus groups and town hall forums in key communities to gauge awareness of the issue, pinpoint perceived challenges, and identify community needs and desires.

### ● **Strategy Setting: Establishing Vision, Objectives, Scope of Work**

Thinking strategically requires articulating a path of intended change and ways to operationalize it. This involves identifying opportunities to scale programs as they grow and gain momentum throughout the life of the philanthropic relationship and specifying process metrics, program milestones and desired outcomes.

CSRC conducts strategic planning; schedules strategic plan updates throughout the life of the effort; identifies appropriate measures to ensure the evaluation and its findings are useful; and creates a mechanism to make program adjustments as implementation begins.

### ● **Implementation Support: Managing the Change Process**

For philanthropic efforts to be effective, businesses need to create a method for helping grantees manage the change process. Far too often the grantees lack management capacity tools and skills to effectively manage the change, including tools to accelerate and sustain growth once the philanthropic program is over.

CSRC provides technical support to the business and the grantees by assisting with the development of an implementation plan to clearly establish the terms and duration of the grant; establishing measureable goals and outcomes; conducting a management capacity audit to identify tools needed for success such as leadership training and technology support; identifying partners to help scale the work; establishing and maintaining thought leadership on the issue; and developing a narrative for, and branding the work of, the program.

### ● **Review and Accountability: Documenting Meaningful and Lasting Change**

Philanthropic efforts should result in meaningful and lasting positive change. For this action to be accomplished, philanthropies must commit to a continuous cycle of evaluation to monitor the success of the program using a variety of measurement tools to document the change process. These measures should be based on a composite of reporting needs: board required outcomes, community based expectations, and research-based criteria necessary for demonstrating growth and return on investment.

From the outset of the program, CSRC works with program staff and evaluators to identify and establish program metrics, including the use of a program logic model. A logic model maps out how the program works by specifying the theory and assumptions underlying the program. The model connects short- and long-term outcomes with program activities and principles of the program, ultimately determining how desired outcomes are achieved.

### ● **Advice and Counsel: Relying on Experts in the Field**

Strategic counsel is one of the hallmarks of CSRC's work. Throughout the life of a philanthropic program, CSRC offers expert advice in how to structure, implement and scale the efforts. We guide our clients on how to collaborate with their boards and executives. We offer advice on how to build and share best practices. Our work focuses on:

- strategy and growth
- human capital, organizational design, and decision support
- operational effectiveness

Many philanthropic efforts require a larger, more diverse leadership team with the professional skills, tenacity, and cultural competency to realize maximum potential. We assist in finding exceptional talent to help philanthropic programs achieve goals and make lasting impacts.

## GE FOUNDATION AND CSRC: A CASE STUDY

The Center for Strategic Research and Communication (CSRC) has assisted the GE Foundation in its efforts to improve public K-12 education systems around the country since 2006. Our goal is to help the GE Foundation create measurable and lasting change. Below is a case study summarizing our work.

**Focus.** During the years, CSRC worked closely with the GE Foundation to help set a course for the Foundation's education portfolio by conducting primary and secondary research and convening stakeholder meetings to help guide direction.. For example, its signature Developing Futures in Education™ program initially focused on seven urban school districts: Louisville, KY; Cincinnati, OH; Stamford, CT; Erie, PA; Atlanta, GA; New York City, NY; and Milwaukee, WI. To help the GE Foundation understand the most pressing education issues in these communities CSRC:

- Conducted a series of focus groups with parents, students, teachers and administrators
- Conducted a series of in-depth interviews with community leaders to provide a clear sense of community needs and aspirations and identify opportunities in which the GE Foundation can build its efforts
- Assisted the GE Foundation in convening a series of meetings with leading nonprofits, think tanks, education scholars and business organizations that focus their philanthropy on education
- Conducted in-depth interviews and meetings with education leaders and policy makers to help the GE Foundation formulate its national strategy

**Strategy Setting.** CSRC assisted the GE Foundation in developing state and national strategies. In addition, in collaboration with the GE Foundation and its consultants, CSRC helped develop a strategic plan for the Developing Futures™ initiative at the district level. The goal of the initiative was to support the district's improvement in the teaching and learning process, especially in areas of mathematics and science. To achieve this goal, CSRC assisted the GE Foundation in developing three-pronged approach:

- Manage the systemic change process
- Build internal management capacity and leadership development
- Establish and implement sustainability and accountability mechanisms

**THE GE FOUNDATION THREE-PRONGED APPROACH**



**Managing the Systemic Change Process**

**Constituency Engagement**

In order for school districts to make positive changes, teacher organizations, school boards and managers need to share expectations, strategic direction and a common vision. Collaboration and mutual learning helps build and maintain support for change.

**Internal Collaboration:**

The diverse groups within a school district—the school board, teacher organizations, superintendent and administrator organizations— must all work together with the same vision and goals for change.

**External Collaboration:**

When reform initiatives are being planned and implemented, the community becomes a crucial partner in supporting that change and moving the initiative forward.

**Building Internal- Management Capacity & Leadership Development**

**Leadership & Professional Development**

Few factors are as crucial to students' success as their access to effective teachers and leaders. Professional development programs provide teachers and leaders with the skills they need to drive student achievement and enact district-wide improvements.

**GE Volunteer Engagement**

A cornerstone of GE's work is its determination to leverage the professional capacity of its executives and staff to support educational reform and encourage innovation.

**Management Capacity**

To help school administrators quickly identify and overcome challenges, GE introduces school district officials to GE management tools and courses, taking time to help local officials customize the corporation's practices to their specific district needs.

**Sustainability and Accountability**

**Sustainability**

The GE Foundation works with each of the districts to ensure the sustainability of the work by building a professional development infrastructure, advising on management capacity and creating lasting collaboration models.

**Assessment & Evaluation**

Like many corporations, GE recognizes the importance of using good data and precise measurements to assess and evaluate performance. The GE Foundation provides technical assistance to school districts on their assessment and evaluation systems to help them make continuous improvements.

**Implementation Support.** On behalf of the GE Foundation, CSRC planned and implemented community engagement campaigns to foster parental and community involvement in student education and promote the work of the grant. The campaigns included media relations, parent and community targeted newsletters, community forums, other publications, and video production.

CSRC also offered strategic advice to district leadership throughout the life of the district grants. For example, in Cincinnati, CSRC worked closely with the district's public affairs staff and superintendent's office on a series of initiatives, including "turn-around" schools, teacher contract negotiations and fiscal stability of schools and district operations. In Stamford, CSRC assisted the Central Office in a community roll out of the Middle School Transformation Initiative, an effort to phase out academic ability grouping. For this effort, CSRC conducted a series of research activities and developed messages and communication strategies for community engagement.

**Review and Accountability.** CSRC worked closely with the evaluators of the Developing Futures program to ensure that evaluation metrics met programmatic needs. When it was time to identify an evaluator to document the grantees accomplishments in terms of increasing student achievement, CSRC engaged the Consortium for Policy Research in Education (CPRE). Also when appropriate, CSRC conducted community engagement monitoring activities to ensure that community issues were heard and addressed as the program was implemented.

**Advice.** On an on-going basis, CSRC advises the GE Foundation on a range of issues: strategic direction, partnership development, thought leadership and best practices development.

**COMPLETE LIST OF SERVICES**

- Communication and Media Audits
- Environmental Scans
- Qualitative and Quantitative Audience Research
- Branding and Positioning
- Corporate Social Responsibility Positioning
- Government Relations
- Strategic Planning
- Communication Planning
- Concept, Message and Materials Development and Testing
- Communication and Media Training
- Implementation Planning
- Conceptual Frameworks
- Speech Writing
- Strategic Counsel
- Evaluation

**SELECT LIST OF CLIENTS**

- |                                      |                                |
|--------------------------------------|--------------------------------|
| AARP                                 | GE                             |
| AARP Foundation                      | GE Foundation                  |
| Annie E. Casey Foundation            | Minute Maid                    |
| Center for Global Policy Solutions   | National Education Association |
| Chevron (Texaco)                     | National PTA                   |
| Council for Opportunity in Education | Novartis Pharmaceuticals       |

**CONTACT INFO**

Center for Strategic Research and Communication  
 8693B Sixteenth Street Suite 189  
 Silver Spring, MD 20910  
 Phone: 202.670.0758  
 Email: [info@researchandcommunication.org](mailto:info@researchandcommunication.org)  
 Website: [www.researchandcommunication.org](http://www.researchandcommunication.org)

NOTES

NOTES