

Seven Lessons from the Marco Polo Inquiry Exploring Leadership and Communications in Foundations

See project description next page, and full article on the Marco project: www.foundationnews.org (archive, may-june 2002, page 34)

1. **A Larger Ecosystem** In all our foundations, whatever their size or focus, we need to make our walls more permeable: to become more connected to the world and the other players around us...more attuned to what others expect of us, and where we add value to a larger process... better consumers of ideas and experience from other players and sectors...and more skilled at designing joint responses to shared needs.
2. **Cultural Adaptability** The wired world is changing the fundamental nature of our political, organizational, and social life. It sets up high expectations for open access, transparency, rich 'storied' data, knowledge sharing, and rapid response time... flattens hierarchies... calls boundaries into question in both positive and negative ways...and makes linking to learn, and learning by doing, the order of the day. Most of our foundations are culturally ill-equipped to operate in this world.
3. **Customer Satisfaction** We find the idea that foundations "don't have customers" (or don't operate in a marketplace, or don't have anything analogous to bottom line accountability) to be misleading and shortsighted. For us to be the organizations we want to be, performance matters. The measure of our performance is not just the evaluated outcomes of our grants. It's also the value our customers – be they donors, grantees, elected officials, or program partners – experience from our work.
4. **Knowledge** We need to get better at learning from and with others, at recognizing grantees as the source of much of "our" knowledge, at enabling others as knowledge creators, at turning grant output into usable knowledge for others, and at determining what skills, systems and cultures inside foundations best support this knowledge work.
5. **Communications as Leadership** The drive for change in foundations comes most directly to the leaders at the top. It demands of us a different set of skills and priorities than we have traditionally been asked for. It compels us to value and practice communications as a leadership skill – for its full power to help build cultures of teamwork, learning, innovation and responsiveness inside the foundation, and to put the full weight of our foundations behind the work of building constituencies for equity and change outside our foundations,
6. **Cross-Foundation Work** Creating a culture of shared work and shared learning across foundations is profoundly important. Echoing the 'silos' that exist within many of our foundations, we have developed as institutions our lone capabilities and identities. There is much we can learn from each other. There is much redundancy – deriving from our instinct to "invent it here" – to eliminate. And there is much potential in thinking of our different organizations as composing a system of problem solving.
7. **Expanded Accountability** In distilling the themes above, we hold ourselves to a new definition of accountability. This new "higher standard" accountability is based on the conviction that unknown, isolated, and perceived-to-be- inflexible organizations will become less and less able to create value in our networked society – thus generating lower return on exempt assets ...and ultimately becoming less accountable in the context of public benefit.

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"I would respect them so much, and I do respect the ones who do this, if I felt they were in a searching mode... that they didn't always "know" ... that they were Marco Polos in a new landscape."

Nonprofit leader, commenting on the role and work of foundations

Marco Polo Inquiry

The Marco Polo project is a leadership inquiry to build support for a new vision and practice of communications in foundations. There are two fundamental drivers for the project: one is an emerging sense of how foundations best exert their leadership and put their assets into play, in the rapidly evolving 'ecosystem' that is public problem solving; the other is the communications that follows from and supports that sense of self.

Tapping into the commitment and intellectual leadership of about a dozen California-based foundations, "Marco" thus aims to develop strategies that can inform participants' efforts to

- increase learning across foundations
- help their foundations become better consumers of ideas, learning and knowledge from other sectors and players
- turn grant output into usable knowledge for others
- increase traffic – of people and ideas – into and out of foundations
- stimulate and support real cultural change
- strengthen relationships with customers and stakeholders
- increase the capacity for foundations to act as a field

Two core products of the Inquiry to date are 1) a set of seven lessons, or themes, that define the kind of leaders and actors the Marco foundations aspire to be, regardless of size, structure or focus, and 2) now in process (spring 2002), a comprehensive communications framework for foundations, that lays out the full range of communications strategies and actions that can support foundation efforts to increase the value of their work, and its impact for public problem solving.

Participants in the Marco Polo Inquiry include: Jane Pisano, California Community Foundation and University of Southern California; Claire Peeps, Durfee Foundation; Steve Toben, Flora Family Fund; Tom Layton, Gerbode Foundation; Peter Pennekamp, Humboldt Area Foundation; Dennis Collins, Irvine Foundation; Gene Wilson, Kauffman Foundation; Kathleen Odne, Leshner Foundation; Caroline Tower, Northern California Grantmakers*; Elwood Hopkins, Los Angeles Urban Funders; Lorna Lathram, Omidyar Foundation; Barbara Kibbe, Packard Foundation; Sterling Speirn, Peninsula Community Foundation; Alexa Culwell, Charles and Helen Schwab Foundation; Diane Ford, Sobrato Family Foundation; Allan Parachini, California Community Foundation*. Marcia Sharp is the Inquiry Coordinator. (*affiliation as of project inception, October 2000)

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