

## Values Aligned Philanthropy Policy Initiative Communications Plan Outline

### Phase 1 - December 5-31

Focus - Anti Hate Statement, Donor Advised Fund Updated Agreement (both effective upon board approval on 12/5/23)

- Anti-Hate Statement
  - Website Soft Launch, short statement
- Donor Advised Fund Updated Agreement
  - Used with new Donor Advised Funds
- Elevator Pitch - Why we are adopting a Values Aligned Approach
  - Internal for Board & Staff
- Mission Update Highlight with anti-hate mention (for first test-run)
  - Video
  - Eblast
  - Social

*During Phase 1, staff will have an internal interim implementation protocol to manage any distribution requests that may require extra due diligence.*

### Phase 2 - Jan 1 - April 30

Focus - Prepping for Values Aligned Policy Effective Date (April 1)

- Donor Communications - Updated Policy
  - Letter Campaign
    - Key Audiences: Fund Holders, Partners in Phil, Future Fund, Social Giving Club, PRIDE Circle, Maggie's Giving Circle, Past Trustees, Heritage Members, Nonprofits, Corporate Partners, Professional Advisors
  - Open House to Discuss Policy Changes
  - 1:1 meetings with Key Donors to share update
- Website Communications
  - Webpage describing policy changes
    - Sample: East Bay Community Foundation: [https://www.ebcf.org/wp-content/uploads/2022/04/EBCF\\_Grant-Due-Diligence-Policy\\_2022.pdf](https://www.ebcf.org/wp-content/uploads/2022/04/EBCF_Grant-Due-Diligence-Policy_2022.pdf)
  - Frequently Asked Questions (FAQ) section
    - Sample: East Bay Community Foundation: [https://www.ebcf.org/wp-content/uploads/2022/04/Grant-Due-Diligence-Policy-FAQ\\_2022.pdf](https://www.ebcf.org/wp-content/uploads/2022/04/Grant-Due-Diligence-Policy-FAQ_2022.pdf)
- Public Awareness
  - Press Release about adoption of Values Aligned Policy
    - Sample: Boston Foundation: <https://www.tbf.org/blog/2021/december/hate-is-not-charitable-20211201>
    - Sample: Innovia Foundation: <https://innovia.org/news/press-release/innovia-foundation-board-adopts-anti-hate-policy-for-grantmaking/>
  - Social Media Plan
    - Video Series of Updates and Growth of ACF, Next 40 Years

- Email Marketing
  - Key Audience: Community Newsletter List

*During Phase 2, staff will have an internal interim implementation protocol to manage any distribution requests that may require extra due diligence. When the policy becomes in effect, this will become a normal operating procedure.*

### **Phase 3 (May 1 - July 31)**

Focus - Ongoing Donor & Community Education & Engagement

- Engagement Opportunities
  - Open House to Discuss Policy Changes
    - 5/15 - VAP Open House
    - 5/20 - VAP Open House
  - 1:1 meetings with Key Donors to share update
  - Lunch & Learn - July 11
- Continual Communications Management
  - Ensure website & FAQ are updated with any messaging updates and information that we discover is needed in Phase 2
- Public Awareness
  - Summer Newsletter