Guiding Questions to Outline Casey Foundation’s Influence Strategies

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DRAFT August 2012

Note: the focus should be on larger influence strategies, not micro strategies

* **What are key population level results/indicators that the portfolio contributes to?**

Poverty results: Low-income families achieve financial stability.

Place results: Low-income families live in communities that support them in raising health, educated children.

Permanence results: Children in low-income families live in stable, supportive and permanent families.

*Is there a particular population for whom you are seeking results?*

* **What kind of change are you trying to trigger with your influence work?**

*Please be clear whether it is a change in capacity (of grantees or the foundation), a change in practice (among grantees, the foundation, or other agencies or organizations), and/or a change in policy.*

* **What target audiences, actors or institutions must be influenced to produce these changes?**

*Consider media targets, grantees, other nonprofits, policymakers, institutions, voters, opinion leaders, other foundations, professional groups, parents, etc. Be as specific as possible.*

* **What are the core components of the strategy or tactics you will use to influence these audiences/actors/institutions?**

*Consider both grantmaking and non-grantmaking tactics, such as media outreach; dissemination of data, research, or tools; convenings; grants to other influencers; network or coalition development, technical assistance and training, etc.*

* **To what extent are the identified strategies and tactics being implemented?**

*Consider how much of your effort is directed to the strategies/tactics that are most likely to influence audiences/actors/institutions. Is there a logical and compelling relationship between the amount of effort and the expected changes?*

* **What evidence exists that these strategies and tactics can influence your target audiences/institutions and contribute to the changes in capacity, practice and/or policy? If no evidence is available, what is your hypothesis about why this will work?**

*Consider academic literature and research, evaluation results from similar efforts, the insights and experience of experts in the field, input from grantees or other relevant sources of information.*

*What information do you need in order to develop or test strategies?*

* **Why and how is Casey particularly well positioned to influence these audiences/ actors/institutions in order to change capacity, practice and/or policy?**

*Consider AECF’s assets, position, credibility, reputation, relationships, skills, political capital, etc.*

* **What indicators of progress will show that the target audiences/actors/institutions are moving toward changes in capacity, practice and/or policy? In what time frame?**

*Consider indicators related to reaching audiences, engaging them, and/or any new action on their part that illustrate progress toward new capacity, practice or policy. If applicable, please specify indicators for grantees’ work and indicators for Casey’s non-grantmaking influence strategies.*

*Be most specific about the indicators of change that will be most important to watch for within the next 12 months.*

* **What external factors or uncertainties may affect progress towards the outcomes you hope to achieve?**

*Consider changes in the political or economic environment, new policies or regulations, the entrance or exit of a key player or institution from the scene, the strength of oppositional forces, organizational culture, budget constraints, actions of other grantmakers, etc.*

* **What support do you need from communications and external affairs, evaluation, social investments or other Foundation units to help implement your influence strategy and to determine whether it’s working?**