



## How ACS Helped One Foundation Find Its Vision and Voice

Foundations are the second biggest source of charitable giving in the United States, some \$75.7 billion in 2019 according to the National Philanthropic Trust.

Good stewardship of those resources happens at many levels, from advocacy in Washington to communication on Main Street, from strategy development in the boardroom to capacity building with community partners.

Place-based foundations in particular have a unique capacity to bring people together, address systemic inequities, and improve quality of life for residents. But to continue building that capacity in response to evolving community needs, foundations must be truly and deeply *of and for* the communities they serve.

The newly renamed Arras Foundation in Lancaster, South Carolina, has grown in recent years into a leading convener, collaborator and grant-maker. Advocacy & Communication Solutions (ACS) was present in partnership every step of the way, as Arras honed its vision and identity to become a recognized force in the community and the eighth-largest philanthropic funder in the state.

“It is a partnership, and a close one,” said Co-founder and CEO of Advocacy & Communication Solutions Lori McClung, “We don’t just swoop in and ‘partner’ once a quarter. We meet them where they are week in and week out, working alongside Arras staff and board at every level to help figure out what they need as they grow. And then we provide the right tools and expertise to help them get the next thing done.”

### The Challenge

With new leadership, Arras (then the J. Marion Sims Foundation) wanted to transform its grantmaking based on community input and engagement. Arras faced several challenges:

- ▶ Needing strategic focus in its grantmaking;
- ▶ Creating deeper relationships with its grant recipients;
- ▶ Introducing new processes to an established oversight framework;
- ▶ Finding a name that didn’t describe the foundation’s work and that didn’t have connections to a controversial figure.

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The foundation had flown somewhat under the radar since incorporating in 1995 with assets from the sale of a local hospital. It had focused on four broad areas—healthy community, education, aging, and healthy children—that had borne much solid work but did not always generate a ready spark of identification in the public eye.

"Many in our community were unaware of our mission," said Arras Foundation President & CEO Susan DeVenny. "We knew we needed to do some deep listening as we began to strive to go beyond grantmaking."

DeVenny knew that to do her best for the community she loved, where she had chosen to raise her own family, she would need help and perspective from outside the community, too.

## The Strategy

ACS knew from long experience in advocacy, communication, strategy development and capacity-building that establishing and developing a community-based vision on a solid footing of trust would be paramount for taking the Arras Foundation in the direction it wanted to go. But first came a time of trust-building in the relationships between ACS and Arras themselves.

"First impressions mean everything," said Arras Foundation Program Director Pam Temple. An RN who once worked at the hospital that gave rise to the foundation, her community perspectives run deep, including service on the foundation board before taking her current position on staff.

"That first summer, of 2016, ACS came in and did community facilitation training with staff and presented a community engagement plan with our board. They were very capable and already had a clear plan. They had fresh eyes, and not in a 'consulting' way. They were not cookie cutter," said Temple. "They brought their expertise and their own personal skillsets, so we could have a conversation as a board, and they would interject when appropriate."



ACS's expertise and skillsets encompass two decades of advocacy work in national and local governmental relations, including lobbying; the full range of internal and external communication, including media relations; short- and long-term strategic and organizational planning; and situational analysis and plan implementation aimed at real capacity building.

As important as providing expanded capabilities through their own shop, ACS readily brought the training to begin building those capabilities at Arras, too. Take for example effective communication, the linchpin of any discussion that wants to launch a real plan of action.

"ACS is able to take things one step further after the meetings are over and create communication plans and documents to tell the story," said Temple. "In the beginning, they were our communication partner. They would do it for us and then staff would edit internally. Now we have a communications coordinator, a young person doing a great job, and ACS serves as mentor, coach and editor."

## The Work

Trust and understanding in the new partnership grew as ACS and Arras got busy on the work at hand, engaging board and staff about their emerging vision and researching what other philanthropic organizations were doing. Next, they took it to the community Arras serves.

“We asked ‘What does the community want for itself?’ because it cannot be the foundation operating in isolation. Developing and implementing that vision must be done in partnership with all residents,” said ACS President Scarlett Boudier. The result was an alignment of Arras’ new transformational philosophy to a concept called SMIRF (pronounced “smurf”). It stands for social, moral, intellectual, reputational, *and* financial capital, and SMIRF became the organizing principle from which all other strategies flowed. SMIRF is a concept developed by the former president of the Council on Foundations, Ambassador James A. Joseph, and is used in varying degrees by foundations around the world.

## SMIRF

### The Five Forms of Capital

#### Social

Utilizing networks and relationships to foster change

#### Moral

Takes courageous, sometimes counter-cultural positions on important issues

#### Intellectual

Disseminates data and meaningful information to community partners and grantees

#### Reputational

Changes the civic conversation about the future direction of the community

#### Financial

Makes grants and program/mission related investments

ACS shared national best practice examples of resource deployment, and guided the foundation in developing a strong community engagement plan and process. Through an initiative that trained staff, interns, and volunteers to lead focus groups and community meetings, the foundation became more visible in the community and formed relationships with other organizations to help elevate the foundation's work and philanthropic energy throughout the community.

"ACS listened to us very deeply and helped us find a way to bring more input and partnerships into our work, both internally and externally," said DeVenny. "In just six weeks of listening sessions with community, staff, and board, they gave us a foundation to realign our work."

It was brass-tacks, on-the-ground work.

In its first community engagement effort, ACS and the foundation reached more than 1,400 residents of Lancaster and Chester counties through community engagement processes—surveys for youth and adults, focus groups for grantee recipients and youth, and Rotary Club meetings. This also included in-depth conversations with current and former Arras trustees.

## The Vision

Armed with input from the community, Arras leadership next needed to capture the lightning of its emerging strategic vision, and then gain community and board approval. ACS facilitated multiple strategy sessions, bolstered by a weekly communication plan, to help board and staff make tough decisions and zero in on a strategic vision.

"I didn't have a vision for the foundation, other than knowing I loved this community and I desired it to have more say over its future," DeVenny said. "I needed to have a trusted partner on the staff side of the bench to help me process my own vision for the foundation and to help check my thinking."

That was where ACS' outside eyes and ears, heart and mind, were indispensable to making the changes at hand.

"It was somebody outside our staff and board whom we trusted to provide us light along the right path, who respected our cadences, who knew our personalities and the dialogue that was needed, who was able to provide the space for that, and who was able to provide a different kind of acknowledgement when we got things right," said Temple.

"They are really good at bringing diverse thought into consensus. That is an enormously important talent and a gift that they bring to our table. At one point, when we were trying to find what was going to be our next big initiative, I remember Lori saying, 'You can pick one thing.' That was hard, but it was what we needed to hear. They were able to help us get there in a short amount of time by setting us up for the big discussion, taking a lot of words and ideas and putting it in a one-pager or a graphic. They kept us focused."

Over time, this deep, close work resulted in changes to the way the foundation does business externally and internally—touching everything from how Arras is staffed to the process for evaluating grant requests to how it collaborates with other organizations in the community.

## Strategic Communication + Rebrand

ACS developed a comprehensive communication plan to help the foundation be strategic and intentional in its community outreach. The biggest hurdle was gaining an understanding of how or if the name of the foundation created barriers to the work the Foundation was trying to do—and then ultimately creating buy-in for changing the foundation’s name.

The foundation was formed in 1995 after the sale of a hospital, with the assets funding the foundation. Needing a name quickly, the foundation trustees chose the name of a building on the hospital grounds—J. Marion Sims—a long-ago medical doctor who was from Lancaster but who had no connection to the foundation or its assets. The foundation was troubled by the connection to Sims, a gynecologist who controversially operated on Black women without anesthesia.

In 2017, Arras began to explore in earnest the reality that its name was a source of confusion and even deep pain to some of its partners in the community.

“We also learned that we had missed opportunities to fully engage with the entire community due to our name being a barrier,” said DeVenny. “The board and staff commissioned a branding advisory team to explore a name that would reflect the foundation’s evolving tenets, values, and work.”

ACS and Arras staff leveraged ongoing community engagement work to devise a strategy for a name-change process and buy-in from the community and the board, and a roll-out to communicate the new name and how it was created. The word “arras” means “diverse tapestry,” reflecting the foundation’s 25-year history of weaving together community assets to build healthier communities in Lancaster County, Great Falls, and Fort Lawn, South Carolina.

Bottom line: By keeping everyone informed, involved, and engaged throughout an extremely sensitive time, the Arras Foundation built strong allies as it sought a wholesale change for how it did its work.

### More Successful Outcomes

The outcomes of this five-year engagement completely transformed the Arras Foundation—its identity, its local and national reputation, the way it grants money, and how it collaborates with the community.

#### Outcome #1: A Refined Strategic Focus

Through feedback from the community, the Arras Foundation identified three strategic pillars: to support and build a healthy community, to help youth successfully transition to adulthood, and to elevate philanthropy.

The foundation adopted its North Star—a guiding principle.

#### Arras Foundation’s North Star:

“We envision the communities we serve as places where all people join together to build on community assets for current and future generations, and where are all people have the opportunity to reach their full potential.”

## Outcome #2: Much More Than Money

With board and community guidance, Arras adopted four tenets of philanthropy that expand its possibilities well beyond just making financial grants and thus leveraging all aspects of SMIRF capital—social, moral, intellectual, reputational and financial—to become a true community catalyst and elevate the philanthropic endeavor across the board.

1. Investments are designed to benefit the community's future.
2. Cooperation with others is paramount to all the Foundation's efforts.
3. Small investments are designed to help people see and believe in positive change.
4. Large investments focus on creating long-term, significant change.

## Outcome #3: A Strategic Direction Through 2022

By partnering with ACS to grow its role as catalyst for community change, Arras has grown its capacities in three areas specifically: to use data and information effectively, to convene partners productively, and to optimize grants to do the most good in the community.

This application of commitment and skills has led to new grant structures and processes that reflect Arras' strategic direction even more clearly and strongly into the community it serves.

## Outcome #4 Infrastructure

Through the strategic visioning and engagement process developed with ACS, Arras saw clearly how it needs to have infrastructure in place to support its strategic direction and grantmaking tenets.

The six main planks of that platform are:

1. **Collaboration:** Active partnership and sharing of work wherever possible.
2. **Community Indicators:** Developing a dashboard of healthy community indicators.
3. **Community Engagement:** Ongoing work to help drive foundation and community decision-making by the people who live, work, learn, and play in Lancaster and Chester counties.
4. **Communication:** Strategic and intentional communication to the community reflective of the strategic direction.
5. **Convening:** Leading meetings and driving conversations not only with the foundation but among organizations and individuals across every part of the service area.
6. **Capacity Building:** Partnering with constituent organizations to solve administrative challenges and increase their ability to execute their primary missions.

## Turning Toward the Future

As Arras begins to plan beyond 2022, community input and listening will remain at the heart of everything it does. Acting from that heart, Arras is poised to become more focused on advocacy in South Carolina and in Washington, D.C. for policy changes that improve the quality of life for all residents in the communities it serves. Work is underway in a wide variety of areas, from capital investment structures at the foundation to COVID-19 recovery in the community, from studying the

impact of the pandemic on nonprofit organizations to finding new and responsive ways to strengthen and build the wide variety of SMIRF capital available for deployment in community applications large and small.

“One of our truest gifts to the community in the long run will be helping residents shape their own future by expanding the capacity of people to raise their own voices,” DeVenny said.

That deep desire for the people of their community to thrive has been bolstered in unique and powerful ways by Arras’ work with ACS, said Temple. “ACS’s perspective, the capital they bring to our organization is invaluable, the skillsets, the personalities, the critical thinking skills, the growth mindset. They are growing with us. They are trusted partners who understand our cadence and are not trying to get out ahead of us but are walking with us.”

