Webinar: Nuts & Bolts of Advocacy

Get clear about why advocacy is an important part of philanthropy

June 2018
"Change-oriented mission statements - by necessity - require a foundation to pursue public policy efforts that attempt to fundamentally change how the system operates."

Emmett D. Carson, PhD. CEO and president of Silicon Valley Community Foundation (formerly CEO and president of The Minneapolis Foundation and MCF board member)
Overview

What is advocacy?
- Research and dissemination
- Policy development
- Public education and media advocacy
- Networking to convene, educate, organize and mobilize
- Building/engaging in coalitions
- Leadership development
- Lobbying
- Grassroots lobbying
- Resource development
- Evaluation
Grantmaking and Advocacy

- Advocacy is fine; lobbying is one part of advocacy
- Need to account for the activity
- No political activity, i.e. supporting candidates
Primary "Don't"

May not support or oppose the election of a particular candidate to public office or support a particular political party.

*This restriction applies to public charities and private foundations.*
Grantmaker Engagement in Advocacy

Can you lobby?

- Private: None.
- Community Foundations: Yes. Some limits.
- Corporate: Yes.
Grantmaker Engagement in Advocacy

Can you be involved with advocacy?

- Private: Yes
- Community Foundations: Yes
- Corporate: Yes
Grantmaker Engagement in Advocacy

You are a resource!

You have relationships.
Grantmaker Engagement in Advocacy

Pro’s and Con’s of Advocacy & Policy Engagement

Pro’s
- May have larger scale of impact than direct service
- May create more sustainable solutions than direct service
- Our direct participation may leverage our grants
- Policy changes influence dollars and may bring more public resources

Con’s
- Longer time horizons
- Public policy debates may become “political” debates
- Will require resources to understand context, build relationships and take action
- Ensure policy issue is not perceived as self-interest
- Board may not be of same mind on policy issues

Acknowledgement to Mortenson Family Foundation
## Grantmaker Engagement in Advocacy

### What Can You Do?

<table>
<thead>
<tr>
<th>Activities</th>
<th>Support</th>
<th>CF/Corp</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct lobby</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Grassroots lobbying</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Nonpartisan research</td>
<td>Yes</td>
<td>Yes</td>
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<td>Respond to legislative request</td>
<td>Yes</td>
<td>Yes</td>
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<td>Communicate about projects</td>
<td>Yes</td>
<td>Yes</td>
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<td>Nonpartisan voter education</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Influence regulations</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Build relationships</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Convene</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Legal actions</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Train grantees resources</td>
<td>Yes</td>
<td>Yes</td>
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Grantmaker Engagement in Advocacy

Strategies for Making the Case

- Discuss the **rationale** for funding advocacy with board members and staff
- Show how funding advocacy fits into the broader **mission and goals** of the foundation
- Demonstrate how funding advocacy can **meet community needs**
- Discuss how the foundation funded **advocacy-like activities in the past**
- Demonstrate how funding advocacy can **enhance current grantmaking** on issues of interest
- Invite the foundation’s **lawyer or other experts** to talk about legal issues
- **Highlight successes** in funding advocacy within the foundation or in other foundations
- Address advocacy in the **strategic planning** process
- Invite **other foundations** that fund advocacy to speak to board or leadership
- Consider implications (positive) for **PR & community relations**

Acknowledgement to Alliance for Justice / Bolder Advocacy
Grantmaker Engagement Thru Coalitions

- Consider a two tier affiliation structure
- Consider general operating dollars
- Consider a 501c3 fiscal host for the coalition

Examples
- Minneminds / Start Early
- MN Census Mobilization Partnership
- MSP WIN
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Formerly CEO and president of The Minneapolis Foundation and MCF board member
Wrap-up

Can you make the change you envision doing what you are currently doing?

Is it time to consider your role in “systems change” through advocacy and public policy?
“Foundations have significant legal opportunity to support and participate in activities that shape public policy, strengthen civic participation, and foster social change. There are rules that must be adhered to, but that should not stop any foundation from seriously considering the wide range of public policy-related actions that might be effective strategies for achieving mission-related purposes.”