



2020
PHILANTHROPY
CALIFORNIA
POLICY
SUMMIT

MORNING BREAKOUT

Philanthropy Meets Advocacy:
Rules of Engagement for Impact



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Philanthropy Meets Advocacy

Rules of Engagement for Impact

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What is Advocacy?

Advocacy is championing or supporting a cause or goal for changing policies or systems.





Avenues of Advocacy

Why Advocacy?

Advocacy Leverages Resources

- NCRP documented ROI of \$115 to \$1
- Government can achieve scale that philanthropy alone cannot

DOCUMENTED THE RETURN ON INVESTMENT FOR FOUNDATION FUNDING OF ADVOCACY

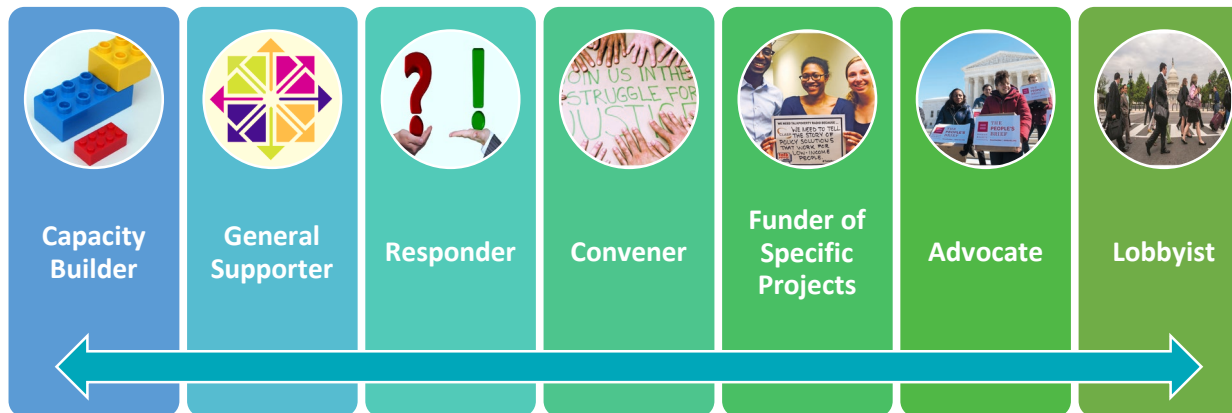
Finally, there's no doubt that foundation investments in advocacy, community organizing and civic engagement have substantial, tangible benefits for families and communities.

Most foundations in the sector don't fund strategies that have been proven to lead to tangible lasting benefits for marginalized and underserved communities by addressing root causes of social problems.

Through its **Grantmaking for Community Impact Project**, NCRP examined the impact of 110 advocacy-oriented nonprofits in seven different parts of the country, and documented beyond a shadow of a doubt that foundation investments in high-impact strategies such as advocacy, community organizing and civic engagement have substantial, tangible benefits for families and communities. In fact, the ROI is \$115 to \$1.



Advocacy Roles for Funders



How do I know what an organization's advocacy capacity is?

Take your
advocacy work
from *good* to
great!

ACT!

ADVOCACY CAPACITY TOOL

**POWER
CHECK** ✓

COMMUNITY ORGANIZING CAPACITY TOOL

RECO

RESOURCES FOR EVALUATING
COMMUNITY ORGANIZING ✓

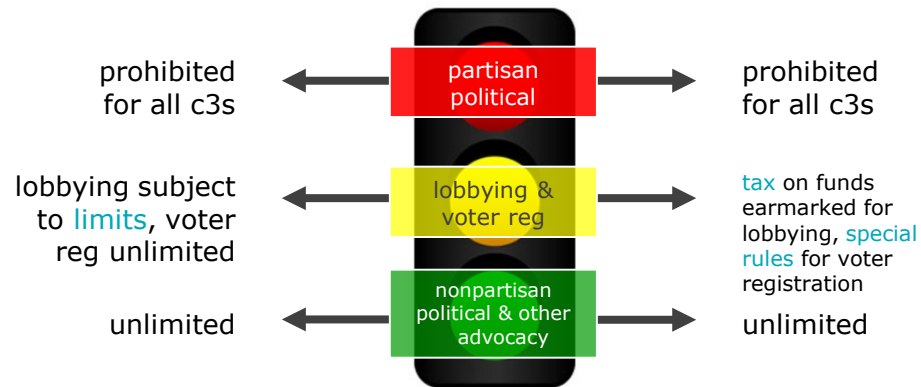
Is Advocacy Legal for Funders?

- YES! There are kinds of advocacy that any funder can engage in.
- It's important to know the rules.
- All funders can fund nonprofits that advocate and lobby.
- Bolder Advocacy is a resource to help you navigate this question.



PUBLIC CHARITY/COMMUNITY FOUNDATION

PRIVATE FOUNDATION



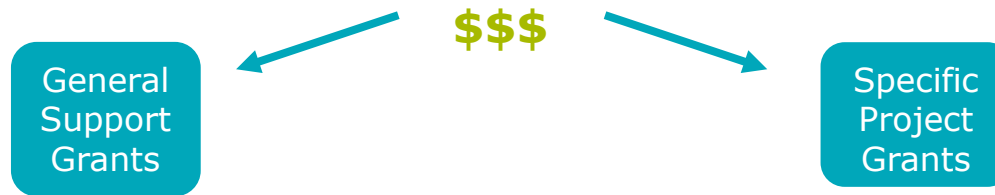
SYSTEMS CHANGE GUIDE

Private foundations may not engage in lobbying or **EARMARK** a grant for lobbying

but...

Private foundations may **FUND** grantees that lobby

Earmark: oral or written agreement that a grant will be used for specific purposes



Capacity Builder

Build capacity of grantees to advocate and lobby

General Support Grants

Funding grantees that advocate through general support

Specific Project Grants

Fund non-lobbying portions of advocacy projects

Electoral Activities

Fund or engage in nonpartisan electoral activities

Make Lobbying Grants

Community or public foundations can earmark to fund lobbying directly

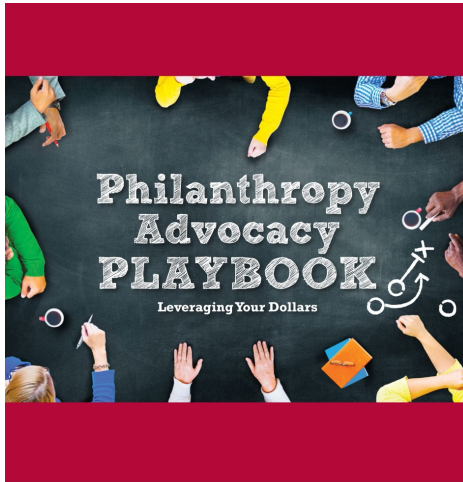
Advocate

Public or community foundations can lobby, all can advocate

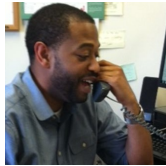
Advocacy Approaches for Funders

- Restricting public charity grantees from lobbying is **not necessary**
- Restrictive grant clauses limit grantees' **flexibility** to accomplish their missions and **ability to lobby** within their own limits
- Grant can say it is not “**earmarked** for lobbying”
- Lobbying restriction is **only necessary** when private foundation makes grant to non-501(c)(3) organizations

Grant Agreements



For more information



free coaching about laws impacting nonprofit advocacy:

advocacy@afj.org

866.675.6229

For free tools, fact sheets, and publications

www.bolderadvocacy.org

 @AFJBeBold @NonaAFJ

 BolderAdvocacy

RALLY

WE ARE ISSUE ADVOCATES

RALLY is an issue-driven communications firm that takes on sticky political and social problems and finds ways to push them forward.

RALLY

FIGHTING FOR CHANGE

LEARNING FROM A DECADE
OF ISSUE ADVOCACY

MAY 2019

TEA PARTY

The Tea Party was a movement for a moment and the 2008 election was the fuse that lit the powder keg.

HEALTH CARE

Advocates waged an impressive campaign from 2009-2010 to pass the Affordable Care Act, the most significant health care legislation of the last fifty years.

KEYSTONE

There was no blueprint for how to stop the fossil fuel industry in the U.S. until the Keystone XL campaign came along.

NET NEUTRALITY

The campaign to defend Net Neutrality used creative tactics to break down a complicated issue and inspire millions of Americans to take action.

SODA TAX

For decades, public health advocates tried & failed to pass taxes on sugary drinks. In 2014, Berkeley, CA turned the tide & created a playbook for future victories.

BREXIT

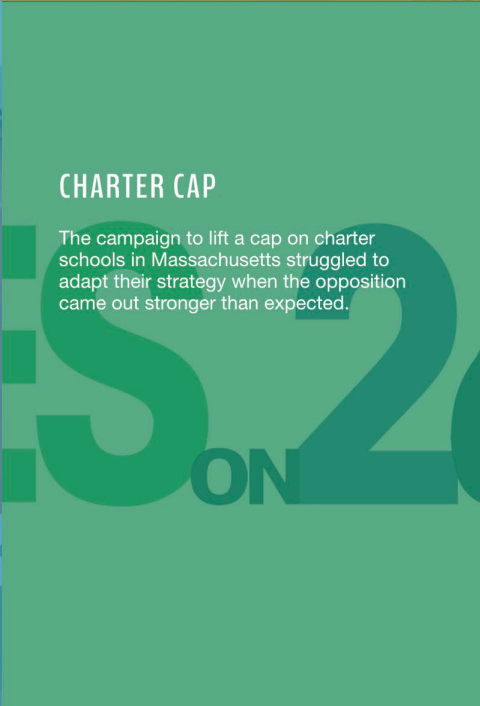
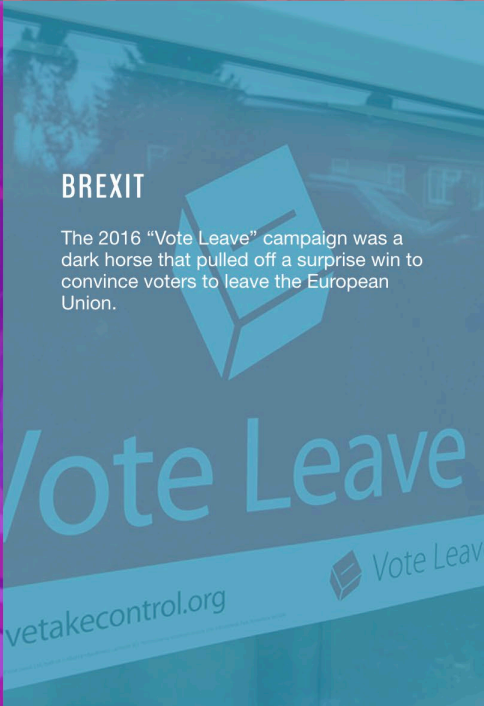
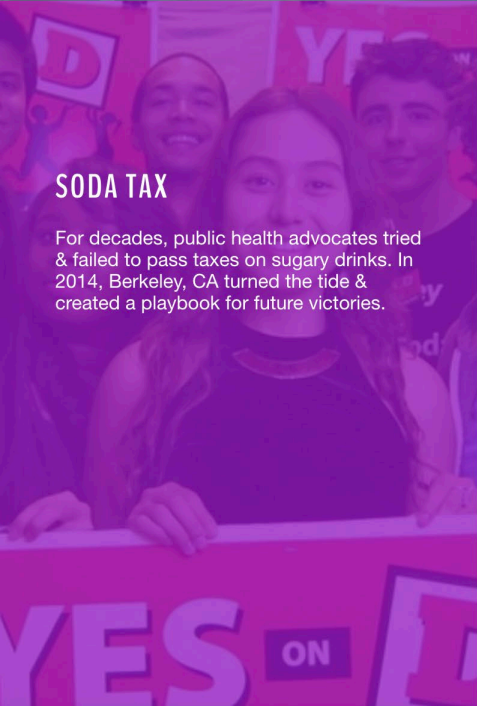
The 2016 "Vote Leave" campaign was a dark horse that pulled off a surprise win to convince voters to leave the European Union.

CHARTER CAP

The campaign to lift a cap on charter schools in Massachusetts struggled to adapt their strategy when the opposition came out stronger than expected.

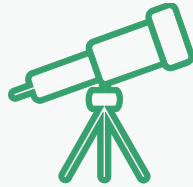
FIGHT FOR \$15

The biggest national labor story in the US in a generation was an effort started by low-wage workers in the retail and fast food industries.



THE COMPONENTS

We identified 8 key components that all the campaigns had in common.



Vision

A bold vision can excite a political base and encourage supportive bystanders to take action.



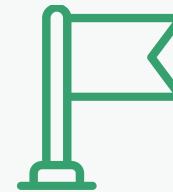
Framing

Good framing identifies a problem, suggests a solution, and motivates people to demand change.



Power

Access to resources, both human and material, can make or break campaigns.



Leadership

Charismatic leaders and strategic thinkers have the power to rally supporters and keep campaigns on track in spite of setbacks.

THE COMPONENTS (cont.)

We identified 8 key components that all the campaigns had in common.



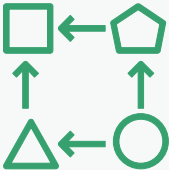
Structure

A combination of strong leadership, a large grassroots network, clear information flow and a feedback loop, and strong mutual trust can make a campaign successful.



Timing

Recognizing a moment of opportunity and being ready to act can lead to success.



Adaptability

Leaders and activists who listen, put ego aside, and are willing to try new things can overcome a changing environment.



Pressure

Campaigns are unrelenting when it comes to applying constant pressure, both online and offline, to decision-makers who need to be pushed.

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CAMPAIGN EXAMPLE: KEYSTONE XL

What campaign components were the most successful?



Pressure



Power

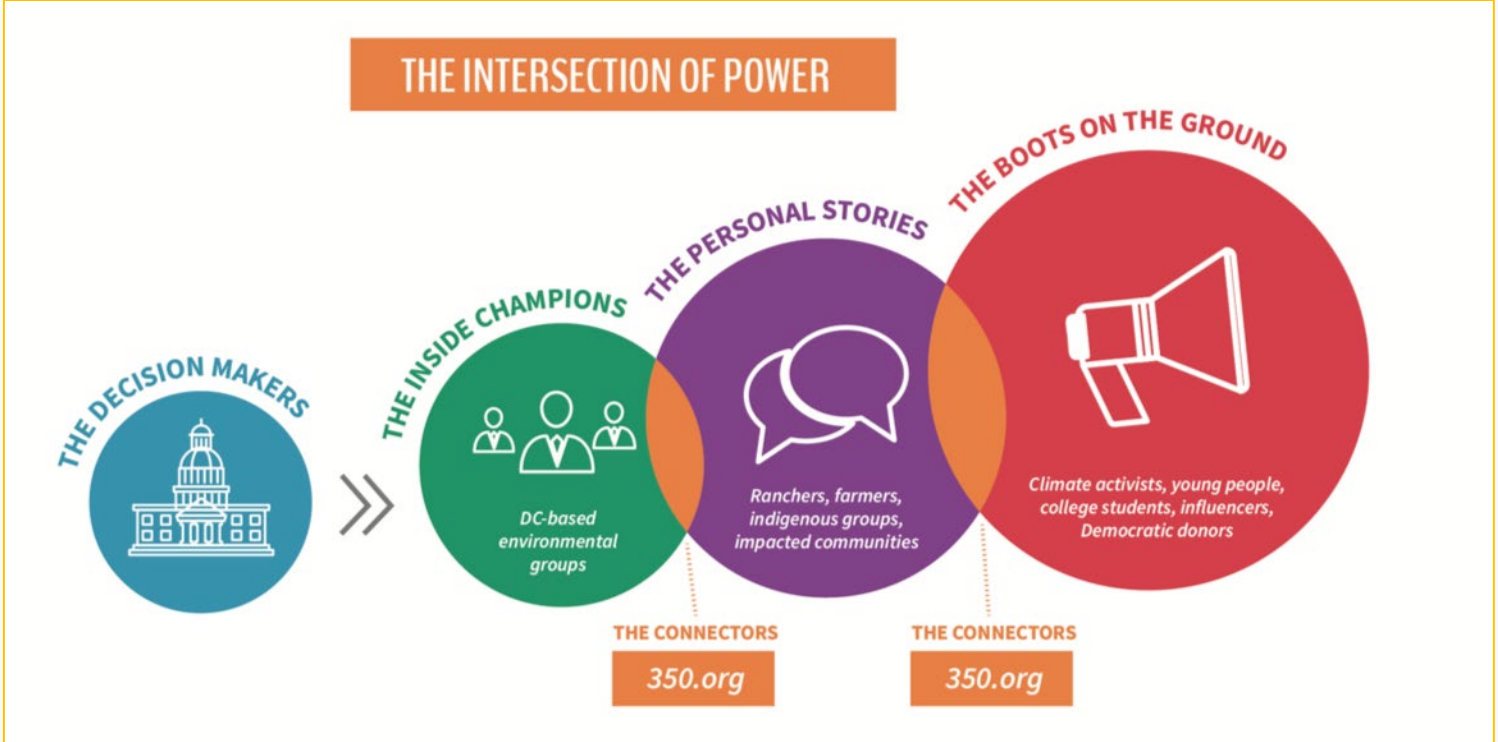
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KEYSTONE XL: PRESSURE



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KEYSTONE XL:
POWER



“The feedback loops in business and government that create pressure for organizations to improve are missing in the philanthropy sector.”

- Kristi Kimball & Malka Kopell

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THANK YOU

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