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

- Organizing
- Educate Legislators
- Get to Know Legislators
- Research
- Nonpartisan Voter Ed.
- Lobbying Exceptions
- Influence Corporations
- Regulatory Efforts
- Litigation
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

- Capacity Builder
- General Supporter
- Responder
- Convener
- Funder of Specific Projects
- Advocate
- Lobbyist
How do I know what an organization’s advocacy capacity is?

Take your advocacy work from good to great!
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.
SYSTEMS CHANGE GUIDE

PUBLIC CHARITY/COMMUNITY FOUNDATION

prohibited for all c3s

lobbying subject to limits, voter reg unlimited

unlimited

PARTISAN POLITICAL

PRIVATE FOUNDATION

prohibited for all c3s

lobbying & voter reg

tax on funds earmarked for lobbying, special rules for voter registration

unlimited

NONPARTISAN POLITICAL & OTHER ADVOCACY
Private foundations may not engage in lobbying or **EARMARK** a grant for lobbying

**but...**

Private foundations may **FUND** grantees that lobby

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

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General Support Grants

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Specific Project Grants

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**$$$**
Advocacy Approaches for Funders

- **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
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

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**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

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BolderAdvocacy
RALLY is an issue-driven communications firm that takes on sticky political and social problems and finds ways to push them forward.
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.
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.
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.
CAMPAIGN EXAMPLE: KEYSTONE XL
What campaign components were the most successful?

Pressure

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

- Kristi Kimball & Malka Kopell
THANK YOU

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