

STAND FOR YOUR MISSION

**THE POWER OF BOARD ADVOCACY:
A DISCUSSION GUIDE
FOR FOUNDATION BOARDS**

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WE DO THIS WORK BECAUSE WE BELIEVE IN SOMETHING.

Whether it's promoting health care and education to transform the lives of children and families, expanding access to the arts in communities, or protecting natural resources — our philanthropic goals are driven by a purpose. We do what we do because we believe that some things are important enough for us to take a stand.

Each of us has made a personal commitment to serve. We do it because it calls upon the better part of ourselves. The part that believes we must try. That believes that when we do try, we can make a difference, even in a world full of tough challenges: resource limitations, differing opinions, and conflicting priorities.

It is a fact of life that decisions get made every day that have a profound impact on our work, investments, and ability to meet our strategic goals. When the issues we care about aren't represented at the policymaking table, we are forced to pick up the pieces — and often asked to foot the bill after flawed decisions are made.

Our communities deserve better.

The fact is that our respective philanthropic goals will never be met if we are relegated to accepting decisions about public policies that are made without us or the voices of our grantees. We can address the root causes of social problems by influencing policymakers and the public to achieve real impact and

leverage our resources — but only if we find our voice.

The most successful foundations have recognized that finding our voice does not require stepping into the quagmire of partisan politics. It simply means using our voices as committed and informed champions for our missions. We are creating real impact by responding to community needs, calling attention to urgent issues, bringing people together, looking for transformative solutions, partnering with nonprofits, and sharing our knowledge to improve public policy.

When it comes to advancing our important missions and goals, one of the most useful assets that we have available to us is something that is woefully underutilized: our voice.

Our perspective matters, as does our willingness to stand up for what's most important to our missions, our communities, and our grantees.

As foundation leaders — board and staff alike — we have the opportunity to serve as powerful champions for our missions. We have the opportunity to partner with our grantees to amplify each other's voices and make good things happen.

It is time for us to find our voice as a social sector. It is time for us to unleash our full potential to make the world a better place. It is time for us to stand for our missions.

DEBUNKING COMMON MYTHS – ADVOCACY VS. LOBBYING

A common myth is that foundations are not permitted to advocate. This is not true. Foundations can fund and engage in advocacy activities. People often confuse the terms “advocacy” and “lobbying.” Let’s address this issue head on and discuss the important differences between these two activities.

Advocacy is an umbrella term for actions that attempt to influence public policy. Successful advocacy means using our voices as committed and informed champions for our missions. Speaking the truth in a calm but unwavering voice. Reminding decision-makers of our shared values and beliefs. Sharing tested solutions to community problems. Helping community leaders understand the impact of their decisions.

Lobbying is a form of advocacy focused specifically on influencing legislation. For example, lobbying is asking legislators to support or oppose specific legislation or asking the public to urge their legislators to do so.

It’s important to remember that most advocacy activities are not lobbying. All foundations can engage in and support an unlimited amount of advocacy activities that are not lobbying or partisan electioneering, and public foundations can even engage in and support some lobbying.

STAND FOR YOUR MISSION.

YOUR MISSION. YOUR VOICE.

BOARD ADVOCACY IN ACTION

BAPTIST HEALING TRUST, NASHVILLE, TN: A BOARD-DRIVEN STRATEGY TO EMBRACE ADVOCACY

The board of the Baptist Healing Trust was at a crossroads. With a focus on extending compassionate health care to vulnerable populations in Tennessee, the Trust's grantees were running into policy roadblocks at every turn. Progress was only going to be made with system change at the state level, and the grantees needed the Trust's help.

As the board members grappled with what their path forward should be, they reached out to other foundations that were investing in advocacy as a strategy for greater impact. They learned from their peers that many characterized their foundation's investments in advocacy as the most important work that they do to further their foundation's mission.

These insights and perspectives bolstered the resolve of the Trust's board, and led to an intentional, purposeful journey that ultimately resulted in the Trust adding strategic advocacy to its core mission statement and devoting a third of the Trust's portfolio to supporting advocacy.

But the board's work had just begun. The members needed to be educated about what it meant to invest in advocacy. Where could they have the greatest impact? What

were the best and most appropriate ways to partner with nonprofit organizations? How would they reorient themselves to the long timelines and frustratingly indirect paths to big wins that often characterize advocacy efforts?

The Trust were fortunate to have several board members who had tremendous experience in grassroots organizing and policy work, who were able to share stories that helped paint a picture of what it means to be a strong foundation partner in advocacy, and what was possible when that happened.

Ultimately, the board and Trust decided to not invest in direct board and staff engagement in advocacy, but rather to help build their nonprofit partners' capacity to engage in advocacy and system change. This meant providing some grantees with unrestricted funding, technical assistance, and investment in building their advocacy capacity. The Trust listened to their grantees and was able to provide the support that was needed, when it was needed.

The foundation didn't have to wait long to see the impact of its investments in advocacy. Its support of the Tennessee Association of Alcohol, Drug and Other Addiction Services helped that organization reframe what had been a hotly debated issue into a bipartisan agreement that increased access to treatment for women who are addicted and pregnant and became a state priority.

It was a huge win for the foundation's mission, and proof positive that investments in advocacy can lead to the potential for real and lasting change.

"We are in our state to help those who are most vulnerable experience healing and wholeness. And without advocacy, without standing up for them and their voice, then we in essence have handcuffed our own voice, and we are not being faithful to our own mission."

Cathy Self, President and CEO, Baptist Healing Trust.



POTENTIAL ADVOCACY ROLES FOR FOUNDATIONS

The following wheel of engagement provides examples of the various ways your foundation can engage or support systems change through advocacy. All of the roles are permissible activities for private and community foundations, and could be integrated into the everyday work of your foundation.



STARTING A CONVERSATION IN YOUR BOARDROOM.

Every foundation has its own unique history, culture, and mission, as well as its own agenda. But no matter where you are on your journey, the path toward greater impact through advocacy begins with an honest conversation in the boardroom; a conversation about your foundation's goals, approach, and, most importantly, vision for the future.

The following guide is designed to help you start that conversation. While some foundations may be able to move ahead quickly because they have already grappled with the more fundamental questions presented here, others may want to spend more time on these questions before moving forward. Regardless of where your foundation starts, we encourage you to use this guide as a tool for facilitating ongoing board dialogue on your advocacy role and for helping you cultivate a culture of standing for your mission at every opportunity.

STEP 1: A SHARED VISION FOR THE FUTURE

Your foundation likely has a mission statement that includes an aspirational vision for the future, based on something that your organization feels is lacking in society and needs to be solved.

Ask your board to answer the following questions:

- Is the board in agreement about our vision for the future? If not, what needs to be adjusted or sharpened?
- How would the world be different if our mission was fully achieved?
- Are our current funding priorities and strategies the most effective way to achieve our vision? If not, what would be?
- What other strategies are available to us to meet our mission?

STEP 2: A DEEPER UNDERSTANDING OF OUR WORK

All foundations are impacted by the larger environment and ecosystem in which you operate. Understanding what that ecosystem looks like for your foundation and for your grantees is a critical step for your board.

Ask your board the following questions:

- Considering our shared vision for the future, what are the root causes of the societal realities or problems that we are working to solve, alleviate, or otherwise address?
- How do we find out about policy changes that could impact our mission/causes?
- Are there policy changes that could address the root causes of these societal realities or problems? Are public policies blocking/preventing our grantees' efforts to achieve our shared vision? Are new public policies needed to eliminate or reduce the root causes of the problems?
- Are there policy proposals being advanced by others that, if adopted, would undermine the operations of the foundation or our grantees, impose burdensome restrictions, or hinder our ability to advance our mission?
- Is there a positive policy environment for foundations and nonprofits to operate in our community, state, and nation, and are we partnering with organizations that work to ensure that foundations and nonprofits develop the capacity to address advocacy challenges and opportunities?
- Are our funding priorities and strategies actively addressing those policy issues, threats, or opportunities? If not, what would change if they did?
- Do our grantees advocate for policy changes that would address the root causes of the societal realities or problems that are of importance to our foundation? If not, why not? Are there barriers to their engagement that we could help address?

STEP 3: DECIDING WHERE TO START

Different foundations will have various levels of comfort as they begin to think about investing in advocacy as a strategy for greater impact. Some will be ready to make big bets by investing in major efforts to promote policy change, others will focus on small, incremental steps, and still others will devote their attention to education, defensive work, and creating a positive policy environment for foundations and nonprofits to operate.

As you think about what's right for your foundation, consider the following questions:

- When we look at the way that other foundations engage in advocacy, is there anything we can point to as a model for how we'd ideally engage in advocacy?
- Are we comfortable and do we have the capacity to be in a leadership position on specific policy issues, or would we prefer to play a behind-the-scenes role?
- Do we want to create the opportunity for our grantees to make specific investments in their advocacy capacity and efforts?
- Should we provide more general operating support grants that provide the flexibility for nonprofits to rally resources and quickly engage in advocacy?
- Do we help educate our grantees about how they can advocate?
- Have we removed any language in our grant guidelines or agreements that unnecessarily suggests or otherwise limits how our grantees can leverage our support for their advocacy efforts?

STEP 4: LEVERAGING THE POWER OF PARTNERSHIP

As you think about accelerating your advocacy efforts, there is a tremendous opportunity to reactively partner with your grantees and foundation colleagues working on similar goals.

It's important that board members understand the positive potential of these partnerships so they can support staff efforts to leverage opportunities by asking the following questions:

- Is there anything we could do to better encourage advocacy among our grantees?
- What can we learn, in terms of best practices, from our grantees that are successfully advocating for policy changes and how could we share these opportunities with other interested grantees?
- Are there foundations that have been assessing the efficacy of advocacy initiatives that could help us understand how to invest most strategically?
- Are we engaging in networks and coalitions that are amplifying advocacy efforts on the issues that we care about? If not, do we want to seek out and join such networks and coalitions, or take a leadership role in forming a new network or coalition if we think it's needed?
- Are there other foundations currently supporting the advocacy work of nonprofits in our community? If so, how could we leverage our joint resources?
- Are there other foundations with missions and interests similar to ours that are currently sitting on the policy sidelines? If so, how can we expose them to the greater impact that we've seen through our policy work to engage them and have them join us by investing in nonprofit advocacy?

STEP 5: MAKING ADVOCACY A PART OF YOUR BOARD'S CULTURE

A true cultural change happens when advocacy becomes fully integrated into the way that your board thinks, makes decisions, and measures its own success.

Ask your board the following questions:

- Do board members regularly ask themselves, individually and as a board: Who have I talked to lately to advance our mission?
- Do we educate our board members about how our foundation leverages advocacy as a strategy for greater impact?
- Do we update board members on policy issues of interest at all of our board meetings?
- Do we identify opportunities for our trustees to add their voices to active policy conversations, when appropriate?
- Is advocating for our mission part of every board member's job description?
- Does our board need training to ensure knowledge of the process and people in our arena for change?
- Does the board recruit people with policy expertise to help guide advocacy efforts?
- How will the board keep apprised of and provide guidance regarding various policy challenges to and opportunities for the sector as a whole, the work of our grantees, and the well-being of our own foundation?

FOR MORE INFORMATION ON HOW FOUNDATIONS CAN LEVERAGE THEIR DOLLARS THROUGH ADVOCACY...

AVAILABLE AT: [HTTP://BOLDERADVOCACY.ORG/FOCUS-ON-FOUNDATIONS/PHILANTHROPY-ADVOCACY-PLAYBOOK](http://BOLDERADVOCACY.ORG/FOCUS-ON-FOUNDATIONS/PHILANTHROPY-ADVOCACY-PLAYBOOK)



ABOUT THE STAND FOR YOUR MISSION CAMPAIGN

The **STAND FOR YOUR MISSION** campaign calls on all nonprofit decision-makers to stand for the organizations they believe in by actively representing their missions and values, and creating public will for important policy changes. A collaborative effort initiated by Alliance for Justice, BoardSource, the Champion Foundation, the Forum of Regional Associations of Grantmakers, the Knight Foundation, and the National Council of Nonprofits, the campaign seeks to unleash the full potential of nonprofits to advance their missions by engaging board leaders more directly in the advocacy work of their organizations.



GET ENGAGED

The most important action you can take is to start a conversation in your boardroom about how advocacy can accelerate the impact of your mission, with this resource as your guide. If you are also inspired to engage with our national campaign, we encourage you to join us.



You can use any of the following hashtags to join the conversation on Twitter: #AdvocacyNow #S4YM #StandForYourMission #StandForMission

SAMPLE TWEETS

I am a #nonprofit board leader and I believe in the power of #advocacy #AdvocacyNow

#Advocacy is a core #nonprofit board responsibility #AdvocacyNow

#Advocacy advances missions, stand up, stop just sitting on a board #AdvocacyNow

Access more resources and tools to support your board's engagement in advocacy at:

WWW.STANDFORYOURMISSION.ORG

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