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How to Implement a Funder-Supported Advocacy Effort and the Integral Role of Policy Consultants

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Why Engage in Advocacy?

Advocacy is interpreted and defined in many different ways. The Alliance for Justice (n.d.), a national association committed to promoting social justice, defines advocacy as “any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others” (para. 1). For some, however, the term is equated with lobbying and its seemingly complex IRS regulations. As a result, some foundations have shied away from the work. Yet advocacy encompasses much more than lobbying, and should be viewed as a set of valuable tools to influence or spur change in policies or systems at the local, state, federal, and global levels.

Over the past decade, there has been growing recognition in the philanthropic community that advocacy can be a powerful tool for funders to effect systemic change within the communities where they invest programmatically. This impact has been demonstrated in a growing body of research that explores the role and impact of foundations in supporting advocacy. Whether by engaging in foundation-led advocacy or supporting the efforts of nonprofit grantees, effective advocacy can boost a foundation’s return on investment (ROI). The National Committee of Responsive Philanthropy has sought to quantify the ROI of funder-supported advocacy. In a 2012 study, it calculated that every dollar invested by funders in policy and civic engagement yields a \$115 return in benefits to the community (Ranghelli, 2012).

Key Points

- There has been growing recognition in the philanthropic field that public-policy engagement and advocacy are critical strategic investments to support social change. For those foundations that are new to advocacy or are contemplating adding this type of work to their portfolio, however, this can be a significant shift in how they do business.
- Before a foundation engages in this type of work, it is critical that leadership and staff understand the role and potential impact of foundations in the advocacy and policy arenas, the practical considerations of how best to engage in advocacy and policy work, and the role of policy consultants in enhancing a foundation and/or nonprofit grantees’ capacity and impact in this arena.
- This article details the key considerations for preparing and launching a successful advocacy effort, as well as specific tools that can help foundations and their grantees make the best use of an external policy consultant.

An article in the first issue of *The Foundation Review* examined the effect of foundation support for nonprofit advocacy efforts on community development. The authors argued that funders play a unique role within the policy landscape that makes them well suited to affect political change. They also found that funder investments in civic capacity contributed to an increase in local communities’ access to resources, strengthened human capital and organizational capacity, and helped communities gain a greater political voice (Auspos, Brown, Kubisch, & Sutton, 2009).

FIGURE 1 13 Common Tactical Activities to Support Advocacy



What Does Funder-Supported Advocacy Look Like?

For purposes of this article, we focus on the role of foundations in developing and executing strategies and initiatives that target changes to policies and practices of organizations and institutions or government policies and legislation. Such advocacy efforts seek to establish new policies, improve existing policies, or challenge the development of policies that diminish resources and opportunities for particular target groups – most often, the economically disadvantaged.

The funders and consultants we spoke with are engaged in policy and advocacy work in California, home to more than 7,000 foundations – many of which were established in the past 20 years. California foundations account for 13 percent of the grantmaking dollars of all U.S. foundations (Center on Philanthropy & Public Policy, 2011). Given the size, scope, and diversity of California’s funding community, a wide range of philanthropic approaches to social change are in play. Over the past decade, funder-supported advocacy has been gaining traction in the state, led by foundations including The California Endowment, the Lucile Packard Foundation for Children’s Health, the Evelyn and Walter Haas Jr. Fund, and the James Irvine Foundation.

Generally, those interviewed for this article indicated that they are committed to advocacy as a philanthropic strategy because they are interested in having a “greater impact” and the

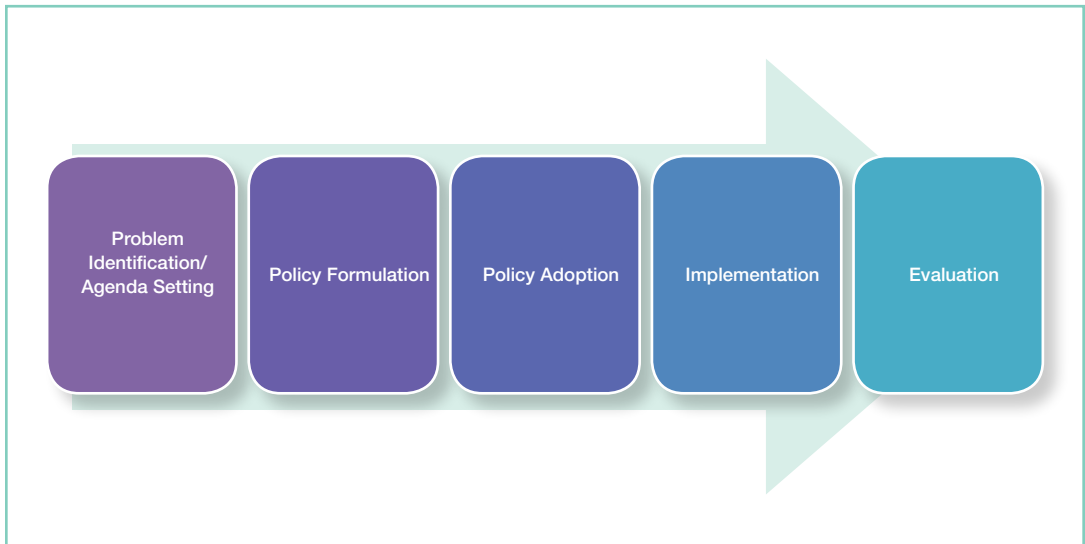
ability to have “an impact on the larger system.” Several funders and consultants referred to their advocacy role as “systems change” or “system reform,” a way of speaking about this type of work that does not have the same political connotations as using the word “advocacy.” Although advocacy has become synonymous over the years with one of its component tactics – lobbying – this was not the most common strategy mentioned by our interviewees. Instead, they indicated that some of the most common funder-supported advocacy work they do include public education, research, civic engagement, and policy development. This diversity of advocacy activities is reflected in research conducted by the Alliance for Justice (n.d.), which notes that lobbying is only one of 13 common activities that support advocacy. (See Figure 1.)

Considerations Before Engaging in Advocacy

Despite the potential value of engaging in advocacy, all interviewees agreed that careful considerations and often-difficult discussions of the challenges must occur before funders engage in advocacy work. We believe these key considerations should be addressed before initiating advocacy efforts:

- *Clear outcomes and strategies.* Foundations that decide to engage in advocacy do so with the hope of having a deeper impact on a specific issue, policy, or social condition. At the outset, foundations should engage in a concerted planning effort to identify the desired outcomes

FIGURE 2 Public Policy Change Continuum



they seek, along with the proposed strategies to achieve those outcomes. Without a clear road map, an advocacy effort can be unfocused and ineffective.

- *Focus of impact.* It is critical that foundations carefully define the approach they will take to achieve their desired policy outcomes. Specifically, foundations must be clear about where along the public-policy continuum they would like to impact change. There are five phases of the policy-change continuum. (See Figure 2.) Funders must decide which phase or phases they hope to impact with their work. This can help them identify what activities they are likely to pursue, as well as what skills and expertise they are likely to need.
- *Organizational support for advocacy.* Support from a foundation's leadership and staff is a precondition for successful advocacy. As one policy consultant shared with us, "The CEO is the easiest sell, because he/she often understands the necessity for advocacy and embraces the long-term vision. The hardest sell is often the staff, because they are so focused on programmatic work."
- *IRS limits on advocacy.* There is longstanding confusion about IRS lobbying restrictions on nonprofits, including foundations. Foundations have varying knowledge about advocacy rules and, while some are quite savvy, some funders equate advocacy with lobbying and therefore believe it is "illegal," and as a result will not engage in it. Foundations must educate themselves on what they are legally able to do and fund before embarking; they might be surprised by the diversity of activities they can support.
- *Foundation staff capacity.* Successful advocacy requires a different set of skills, knowledge, and activities than those needed to design and manage grants or program-related investments. Foundation managers are often experts in programs or issues, not the art of advocacy. Understanding what your team can and cannot do will help to identify where additional capacity is needed and whether or not an external consultant should be engaged.
- *Time.* Developing and managing an effective advocacy approach can be complicated and time-consuming for both funder and grantee. It is also a process that typically takes a long time to bear fruit. A foundation must be willing to support multiyear advocacy efforts for real change to occur.

- *External environment.* It is critical to understand the environment in which your foundation seeks to make change. This includes knowledge of the political climate, the policy landscape, and the players who may already be working on this issue, as well as their strategies and track record. In addition, look at how other communities have tackled a policy issue your foundation would like to pursue. By taking the time to understand the environment, foundations will be in a better position to assess their likelihood of success, identify potential partners in the philanthropic and nonprofit sectors, and uncover any possible roadblocks and opportunities that they were not aware of when first identifying their advocacy goals.
- *Defining success.* During the planning stage, your foundation must look realistically at the probability of achieving the articulated policy and advocacy goals. Along with a realistic assessment of success, foundations must recognize that success can take varying forms and that unintended successes (or consequences) may crop up. Not only does the required change take time, but foundations must also define and celebrate smaller victories along the way. Without those interim successes, foundations may lose the momentum to keep pushing for larger goals. (See Text Box: *What To Do: Plan and Chart a Clear Course.*)

Choosing a Policy Consultant

Foundations that have engaged in advocacy over the years often have the knowledge and skills internally to develop, launch, and manage an effective advocacy campaign or initiative. Yet there are also foundations that may be new to advocacy, lack in-house policy expertise, or require training and technical assistance for their policy grantees. In these situations, engaging a policy consultant to design, develop, run, and/or evaluate an advocacy effort can be a valuable investment.

To choose the right policy consultant, a foundation must take the time to understand what type of skills and expertise it needs to add to the team. Policy consultants are not all crafted equally; each offers a set of skills based on their policy and advocacy experience. Skills needed to define a policy agenda may not be those necessary to advise on how best to encourage, recraft, or push legislation through to adoption. An entirely different skill set is needed for monitoring implementation and evaluating impact of the advocacy work. A foundation may find a policy consultant who possesses many of these diverse skills, or may need to identify a few consultants to provide expertise at different points along the way. Policy is a dynamic process, and the consultants involved must be willing and able to jump in – and jump out – based on their skills.

What To Do: Plan and Chart a Clear Course

A funder's community-building initiative was 10 years in the making and is still going strong. To avoid reinventing the wheel, this funder engaged a consultant at the outset to conduct background research on other community-change efforts. The consultant was charged with sharing lessons learned with foundation staff and outlining a clear theory of change. From this, the funder identified participatory leadership as its primary goal and crafted an initiative that funds communities to develop their own community-based policy agenda; engage in a clear, proven method of community change; and track a common set of data metrics captured across the funded sites. The consultant facilitated cross-site convenings early on and throughout the initiative so that grantees, foundation staff, and the consultant could have targeted conversations, a process that encouraged shared learning and increased trust. As new grantees were funded, they had opportunities to dialogue with earlier-funded grantees to support their learning. This effort continues to be successful because the funder took the time to understand the multiyear nature of the work, engage a consultant to help guide both the foundation and grantees, work in collaboration with grantees, and implement a clear framework for evaluating the impact.

Key Consultant Roles to Support Advocacy

Our research identified the following five ways that policy consultants were contracted to support foundations: communication and research; strategy design and implementation; grantee capacity building and training; coalition support; and evaluation and assessment.

Communication and Research

One consultant interviewed told us that the best foundation-led advocacy campaigns have an effective communications strategy. Key to this strategy is the crafting of campaign materials, such as policy briefs or fact sheets, to establish a funder's expertise and credibility on a particular policy issue.

This is why conducting research and creating solid materials in advance of a policy campaign are so critical. Nearly all consultants and foundations we interviewed noted that consultants are often brought in to conduct issue-based research and data analysis, as well as to create communications tools to position a funder and effectively frame a policy issue.

Strategy Design and Implementation

The underpinning of any successful advocacy effort, no matter its size, is a clearly defined strategy. Consultants can be retained to help develop strategies for policy change, building on lessons learned and sharing with the funder and their grantees the ins and outs of working with elected officials or government institutions.

Consultants are also brought in to conduct the day-to-day advocacy work in lieu of foundation staff. The best consultants for this purpose have expertise in policy and advocacy processes, approaches, and methodologies, and not necessarily knowledge of a specific issue or policy.

Grantee Capacity Building and Training

The most prevalent activity in which the consultants we interviewed have engaged is training and technical-assistance support to grantees funded by a foundation for advocacy or systems-change work.

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Technical assistance includes a range of consultant-led activities: coaching and training; building the internal capacity of a grantee to conduct advocacy activities; strategic thinking; and the development of action plans and timelines for implementation. Policy consultants are often called on to troubleshoot once an effort is underway because the policy-campaign process is complex, nonlinear, and dynamic.

A consultant can also play a critical and neutral role in mediating the dialogue between funder and grantee, helping a grantee navigate the political waters or communicate a situation to a funder. One funder discussed the importance of the grantee/consultant relationship in the policy arena:

Assertive, repeated outreach by a consultant to grantees was needed, as they did not readily reach out for support. Consultants in these situations need to build trust with the grantees to the point that grantees are comfortable sharing weaknesses with the consultant without fear of injuring their standing with the funder. Using a consultant as an intermediary rather than funder staff doing this was valuable in creating distance and reducing the discomfort/resistance of grantees.

While consultants are also commonly hired to support capacity building of grantee staff or community residents working with a grantee, our interviewees agreed that education and capacity

building of grantee boards was an area of need since boards may be apprehensive about engaging in advocacy. However, our interviewees indicated that they are rarely called in to work with boards.

Coalition Support

Policy and systems change do not always occur as a result of the efforts of a single foundation or nonprofit. Rather, building coalitions to achieve a collective agenda is what makes advocacy successful.

Policy consultants can help a foundation convene other funders and organizations interested in an “advocacy conversation,” as well as build the capacity of community and partnership members to work in coalition and implement a common policy agenda. Consultants can also serve in a neutral, facilitative role to help the coalition move its agenda. One consultant interviewed was retained by a funder to help build a community-based coalition consisting of parents, local businesses, and community organizations to promote healthy food. In that capacity, she provided advocacy training for the collaborative partners and led parents on a lobbying visit to the state capitol.

Evaluation and Assessment

Evaluating the effectiveness of any advocacy effort is notoriously challenging, in part due to the political nature of advocacy and the very

long and nonlinear path policy change can often take. Consultants in this arena are often called on to evaluate campaigns or coalitions, create work plans and logic models for advocacy efforts, conduct community assessments to support policy agendas, and build the skills of communities to be able to report on changes. Building an evaluation component into a foundation’s advocacy plan during the planning stages with the assistance of an evaluator who understands advocacy is highly encouraged. (See Text Box: *What Not To Do: Change Direction in Midstream.*)

What Makes an Effective Policy Consultant?

In addition to the five technical roles, consultants bring unique skills and qualities to policy advocacy work. In order to engage in this dynamic work, there are five key attributes that our interviewees – consultants and funders – noted as critical to consultants effectively meeting the needs of a foundation.

Passion and Commitment to Innovation

The best policy consultants are passionate about the work they do and committed to helping their clients think creatively about how to effect change. The policy consultants we spoke with enjoyed this type of work primarily because of the “ability to be innovative” and the gratification of “working with committed,

What Not To Do: Change Direction in Midstream

One foundation wanted to build local advocacy capacity by funding issue-driven coalitions in different locations. A multisite intervention was planned by a foundation to support local grantee coalitions, along with support from policy consultants. Despite the fact that these local coalitions did not have strong policy expertise, the course of the initiative was modified and the necessary technical support from policy consultants was eliminated; the funder left it to each grantee to find its own policy consultant. As a result, the initiatives could not move forward as intended because the local coalitions did not have the necessary expertise, including the ability to know what type of consultant was needed. Although money was technically saved, the overall impact was a loss because there were 18 community collaboratives operating with little direction or expertise. After two years, only two of the 18 coalitions had made progress on their policy agenda. The collaboratives remained stagnant because they did not have the capacity to identify a consultant, create a policy agenda, or move it forward.

creative, and intelligent people who want to make positive changes.”

Consultants were frank with us, noting that the availability of resources when working for funders was greater than when supporting nonprofits or government agencies. These resources allowed them to apply their knowledge and build their client’s capacity in more diverse and exciting ways. One consultant noted that her team, which had been brought in by a funder to evaluate policy- and systems-change work, was able to “design new methods and approaches [and] create other innovative concept-mapping and participatory, community-based techniques. It was a privilege to have resources to push the envelope regarding how people think about evidence and evaluation.” This type of innovation is typically not fiscally possible when a consultant is contracted with a nonprofit directly.

Technical Policy Skills

Our interviewees saw as critical a deep familiarity with and knowledge of the legislative process and experience with the advocacy spectrum, including lobbying – even if the particular project did not call for lobbying. This level of technical skill is found in someone who knows how the public sector works and how public policy is formed.

Knowledge of the advocacy continuum is critical to supporting both the funder and grantees. The grant “deliverables” often involve advising on strategy, so it is important that these consultants understand the political landscape, policy opportunities, and roles of various influencers and decision-makers in a particular locale.

Strong Relationships

The ability to form relationships and serve as a connector of people and groups is a valuable quality in a skilled policy consultant. When considering hiring a consultant to build political will toward a policy issue, find someone who has “insider” political relationships and positive rapport with policymakers, staff, and other key political influencers.

Also important is the ability to forge and maintain strong relationships with partners. This is often

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referred to as “strong facilitation skills” or an ability to “work in a dynamic team,” which is particularly important when advocacy work is being done by a collaborative or a network. Mediation skills and an ability to facilitate a diverse partnership are key to this aspect of policy advocacy work.

Communication Skills

Communication skills come in a variety of forms, from writing a persuasive policy brief to ensuring that all partners leave a strategy meeting on the same page. Nearly all interviewees identified strong communication skills as a key quality of a policy consultant.

Given the dynamic nature of the work, check-in calls, frequent updates, and developing strong written content on short timelines are often the norm. The writing style of the consultant also matters here, and the consultant must be flexible enough to prepare policy briefs for foundation executives, communicate the complex policy issues in the brief to community groups, and craft language for legislation.

Topical Policy Expertise

Some of those we interviewed called topical policy expertise a necessary skill, while others cautioned against relying solely on such expertise. Some argued that topical policy expertise is critical for particular tasks, for example, hiring an air-quality expert to write an environmental-justice brief for a campaign or working with a child-welfare expert in creating a community-based curriculum to advance a specific child-welfare policy. But interviewees were largely confident in foundation staff's content knowledge and saw the primary role of a consultant as providing social-change and policy expertise, with subject-matter knowledge a secondary benefit.

In fact, some interviewees cautioned against content experts to avoid the following scenario: Grantee A works with a consultant to successfully create strong, evidence-based programmatic interventions based on the consultant's content expertise in early childhood education. The grantee has a positive rapport with the consultant and wants to work together whenever new projects in that arena arise. The grantee retains the consultant to also inform a "new policy grant." The consultant, however, is not familiar with community-change processes or policymaking and cannot provide the support the grantee requires for this new venture.

Several of those we spoke with experienced such a situation. There was consensus that when funders ask grantees to hire consultants directly, especially grantees for whom policy work is new, funders should weigh in on the desired consultant skill set. (See Text Box: *What to do: Let New Learning Flow Upward From Communities.*)

Final Considerations for Funders

We believe that if foundations want to make significant progress toward systemic and lasting change, it is essential to add policy advocacy to their range of funded activities. Engaging in advocacy requires a different approach and expertise, however, and policy consultants can be invaluable for those funders that need guidance and support.

For the funder-consultant relationship to work effectively, we recommend funders consider the following areas and ideas:

Be Prepared for the Long Haul

Policymaking and systems change are nonlinear, dynamic, and complex processes. They require time and fortitude, and funders need to be comfortable with and prepared for the long haul. Before embarking on advocacy, funders must clearly understand a realistic time frame of policy change and be willing to support it through multiyear commitments.

What To Do: Let New Learning Flow Upward From Communities

One foundation wanted to affect health equity, and it was committed to having the funded collaboratives engage community agencies and residents. Community residents gravitated toward community gardens: they wanted to have them, they wanted support for them, and they wanted to be a part of sustaining them. The challenge was that field research had demonstrated that community gardens were not a highly effective strategy for moving communities toward healthier eating. Still, the evaluation consultants hired by the foundation for this effort saw the continued excitement among community residents and leaders and their commitment to this particular strategy. The consultants made the case to the funder that community gardens were a promising practice, perhaps not for increasing a healthy food supply or sustaining healthy eating behaviors, but for increasing knowledge of food systems and, more important, building a strong sense of community, empowerment, and engagement. Rather than dismissing the advice of the consultants, the funder was open to learning and understanding how this activity could fit along the pathway to resident engagement, advocacy, and over time, behavior and outcome changes.

Engage Consultants Early

Engaging consultants early in the planning process allows them to gain a clear picture of the funder's goals, process, dynamics, and role within the effort. Waiting to engage a consultant until everything is planned and ready to be executed will result in a missed opportunities, such as providing critical input on a pressing issue or establishing a key partnership. Retain consultants early on and see how much more easily the work flows.

Hire Local Consultants

A funder must recognize that its grantees are going to be working in their communities for a long time. It is important, therefore, that their leadership capacity is cultivated. One way to ensure this is by hiring local consultants who understand the community dynamics and can grow with the grantee and continue to support staff and leadership.

Local consultants who focus on capacity building and training are going to provide a better bang for the buck. As one funder told us, using large, global consulting firms may be the norm for health care organizations, but they may not be the best fit for community-based change. Although such consultants may be very skilled in certain areas of planning and strategy, they will not have the relationships on the ground or be positioned to provide the relatable coaching and technical assistance to the grantees that will sustain the work.

Learn From Consultants

The consultant often acts as a funder's eyes and ears. Plan your initiatives so that you can gain insights and learn from your consultant.

Funding the "winding down" of initiatives is also important, to allow for thoughtful reflection and review with consultants before the engagement ends. A more flexible engagement should be considered so that you get the most out of your consultant.

Share Power With Consultants

Power sharing is an elusive concept; it is difficult to describe, but we all know it when we see

Essentially, foundations must be comfortable with and trust the capability of their consultants so that a true partnership can be established. It is a mistake to leave your consultant in the dark about what are seemingly internal deadlines, time frames, and trends; it can limit their ability to be truly effective.

it in action. Essentially, foundations must be comfortable with and trust the capability of their consultants so that a true partnership can be established. It is a mistake to leave your consultant in the dark about what are seemingly internal deadlines, time frames, and trends; it can limit their ability to be truly effective.

More than half the consultants we interviewed had experiences where they were surprised or felt that the rug was pulled out from under them. For one consultant who has worked extensively with the public sector and foundations, the differences were clear: The foundation "is a hidden domain in a way. In public, things are so public; but sometimes here, you don't know what support the project actually has. It can be a challenge."

Foundation staff should fight the tendency to be overly involved in a grantee's policy-advocacy work. One consultant shared with us that when a funder over directs the consultant or grantees, progress can slow. Micromanaging can also lead grantees to be more focused on pleasing funders than on attaining their advocacy goals. It is important to have a clear model for how decisions will be made. As one consultant noted, "The more cooks in the kitchen for policy decisions, the greater the nightmare it can become." If you hire

consultants to be on the ground and serve as your connection to the community, then trust them to succeed.

Conclusion

Advocacy and policy-change funding require a different approach and skills than funding for programs or core support. Funders must be aware of and comfortable with the extended timelines of policy change and the power dynamic that is often at play in interactions between funders, consultants, and grantees. This is a growing field, and it is important to learn from and share examples of successful initiatives to serve as models for other efforts. Ultimately, there

is an element to this work of having to simply jump in and try it – to see if it fits within your organization’s culture and goals or not. As in any progressive change effort, positive reinforcement is needed in advocacy work. Celebrating “wins” shows funders and community organizations the tangible benefits of this work and can move them past a reluctance to advocate. Philanthropic engagement in advocacy and policy change provides unique opportunities for our society; as more foundations support advocacy and do so strategically, the impact on some of our most pressing social issues can be lasting and profound. (See Text Box: *Useful Resources for Funders.*)

Useful Resources for Funders

Advocacy Tools and Resources

- *Alliance for Justice* provides several resources for funders and grantees on advocacy definitions, lobbying restrictions, guidelines, and evaluation. Its initiative, BolderAdvocacy, is a one-stop-shop for information on policy advocacy: www.bolderadvocacy.org.
- *Pathfinder International’s Straight to the Point Series* has tools to help funders and nonprofits develop advocacy strategy: <http://www.pathfinder.org/publications-tools/pdfs/Straight-to-the-Point-Mapping-an-Advocacy-Strategy.pdf>.
- *The Foundation Center’s GrantCraft* service offers useful guides for foundations engaging in advocacy, particularly Advocacy Funding: The Philanthropy of Changing Minds: <http://www.grantcraft.org/guides/advocacy-funding>.

Community Change Resources

- A comprehensive toolkit for all aspects of community change is the *Community Tool Box*, a service of the Work Group for Community Health and Development at the University of Kansas: www.ctb.ku.edu.
- A basic understanding of community-organizing principles is also key to meaningful policy-advocacy work: <http://www.geo.hunter.cuny.edu/~mclarke/TheBasicsOfCommunityOrganizing.pdf>.
- *SOUL’s Political Education Workshop Manual* provides an in-depth community-organizing toolkit: www.schoolofunityandliberation.org.

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