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Assessing a Foundation's Contribution to Public-Policy Change: A New Framework

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Keywords: Foundation, contribution, public policy

Key Points

- This article presents a framework for evaluating a foundation's role in complex policy-change efforts, based on a 10-year retrospective evaluation of The California Wellness Foundation's grantmaking in public policy.
- After examining more than 25 policy outcomes associated with the foundation's grantmaking priorities, three dimensions of contribution emerged: the role of its grantees relative to other organizations, the prominence of its role and funding relative to other funders or donors, and the degree of alignment between the policy change and the foundation's policy goals.
- The experience of The California Wellness Foundation illustrates that there is no single approach to supporting work toward major policy change, and that a foundation's grantmaking approach should be aligned with its philosophy of how change happens and how it relates to its grantees and with the external policy environment.

Introduction

A guiding principle in evaluating policy-change activities is that the evaluation should focus on foundation – and grantee – contributions, not attribution (Guthrie, Louie, David, & Foster, 2005). Most policy-change efforts involve numerous organizations, policymakers, and funders, so drawing a direct link from a single grantee or funder to a particular policy outcome is extremely difficult, if not impossible, in a complex policy-

change environment. The question remains, however: How can a foundation's contribution be captured?

We were challenged by this question as part of a 10-year retrospective evaluation of a foundation's public policy-related grantmaking. Further complicating the analysis, the foundation had multiple grantmaking portfolios and provided primarily core operating support.

After examining more than 25 policy outcomes associated with a foundation's various grantmaking priorities, two key dimensions of contribution emerged that we believe can help describe a foundation's contribution as well as inform strategy development at the front end. In addition we identify a third component, which funders that are "less directive" in their grantmaking may also find useful. Here, we present a framework using these three dimensions.

Background

In 2001 The California Wellness Foundation (Cal Wellness) launched its Responsive Grantmaking Program, which focused on nine portfolios: diversity in the health professions, environmental health, healthy aging, mental health of transition-age youth, teenage-pregnancy prevention, violence prevention, women's health, work and health, and a special projects fund for support of the safety net as well as health reform and other emergent public-policy issues.

Cal Wellness was an early leader in recognizing the importance of public-policy change in achieving its goals and mission. To that end, all portfolios were required to include public-policy grants and activities. In 2012, 10 years after beginning the Responsive Grantmaking Program, the foundation sought to evaluate the collective contribution of its efforts related to public policy.

Public-policy activities are fundamentally different from direct services and other types of programs or projects. Success is not solely dependent on how effectively or efficiently the organization operates, but is also influenced by dynamics outside of the organization's direct control. Success often does not come within the time frame of a grant, and circumstances and goals frequently change during a typical three-year grant period. Finally, success is not defined solely by the policy outcome, but also by the progress made along the way. (Guthrie, et al., 2005; Gill & Freedman, 2014; Teles & Schmitt, 2011).

MastersPolicyConsulting conducted a multi-pronged evaluation that explored many aspects of the foundation's investments related to public policy, including its role in achieving public-policy change.

As a self-described "responsive" funder, Cal Wellness did not stake out a set of explicit policy goals at the outset of the Responsive Grantmaking Program. Believing that grantees are better informed on the policy context and should determine the priorities, the foundation's general philosophy was to defer to grantees to set policy agendas and provide the organizations with the resources to advance them. In keeping with that philosophy, nearly 60 percent of all public-policy grants were for core operating support, and 65 percent were three-year grants (Harder, 2012; Krehely & House, 2005). From 2002 to 2012, Cal Wellness made 724 grants to 306 organizations that were coded as public-policy grants by the program directors.¹

¹ Each portfolio also supported grants for direct services, leadership, and capacity building, for example. Consistent with all federal and state regulations, no funds associated with specific project grants were earmarked for lobbying; grants were earmarked for lobbying.

Methods

- Recoding and analysis of California Wellness' inventory of 724 public-policy grants, totaling \$131 million.
- Survey of 306 current and former policy and advocacy grantees, with a response rate of 41 percent.
- Interviews with 11 current and former program directors.
- Interviews with 32 grantees and 18 key informants, covering each of the portfolios.
- Literature review and independent research regarding the major policy accomplishments and changes in the public-policy environment over the 10 years.

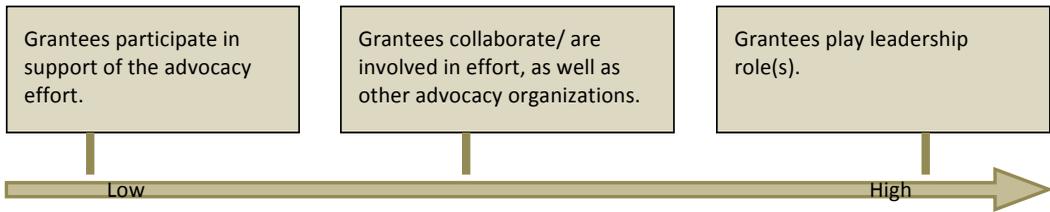
Through interviews with grantees and outside key informants, surveys, and an independent review of the major policy accomplishments and changes in the public-policy environment over the 10-year period of the grant program, we identified dozens of major and minor policy and systems changes that were related to the program's nine portfolios. Some were major legislative victories, the result of years of work and numerous organizations' efforts. Others were narrow policy changes, championed by just one or a limited number of organizations.

Assessing Contribution to Policy Change

After cataloguing all of the policy and systems changes associated with each of the portfolios, we winnowed the list down to 25 policy accomplishments that were identified most prominently by foundation staff, grantees, and key informants and that also spanned the nine portfolios. We then sought to better understand and describe the ways in which the foundation contributed to those outcomes. In particular, it was important to be able to distinguish situations where the foundation played a significant role from those where it played a more supporting role.

In this article, we use the word "contribution" in its common definition: to be an important factor or to help to cause something to happen. The analysis presented is not a "contribution analysis," which is a "rigorous evaluation method that determines whether a credible and plausible case can be made that an advocacy effort contributed to its policy-related outcome" (Beer & Coffman, 2015,

FIGURE 1 Spectrum of Roles of A Foundation's Grantees in Policy Change



p. 12). Contribution analysis relies on the presence of a strong theory of change and ultimately works to verify the theory of change (Mayne, 2008).

Although such an analysis would provide a high level of depth and rigor, it was not a realistic or appropriate analytic method for this evaluation for five significant reasons:

1. None of the foundation's portfolios had a theory of change;
2. For most of the portfolios, Cal Wellness did not identify specific policy goals it was working to achieve;
3. The foundation provided primarily core support to its advocacy grantees;
4. Each portfolio had multiple associated policy outcomes; and
5. Each portfolio focused on a separate policy-advocacy field, with different players.

After synthesizing the various data we collected in order to analyze the 25 policy and systems changes across the portfolios, two primary dimensions of contribution emerged:

- the role of Cal Wellness' grantees relative to other organizations, and
- the prominence of the foundation's role and funding relative to other funders or donors.

We also identified a third dimension – the degree of alignment between the policy change and foundation's policy goals. Because Cal Wellness generally provided core operating support and deferred to grantees to set the policy agenda, this dimension provided an added layer to the analysis and evaluation of the foundation's grantmaking and contribution to public policy. However, we recognize it may not be relevant for all foundations' policy efforts and, therefore, it is offered as an option depending on a foundation's approach, as will be described later.

Framework for Assessing a Foundation's Contribution to Change

There are three factors in assessing a foundation's contribution to specific policy and systems changes:

- The role of a foundation's grantees in a policy-change effort. In most policy- or systems-change efforts, there are multiple advocates, policy researchers, grassroots organizations, and coalitions working to achieve the change. Some play leadership roles; others may support the effort in more limited ways. In this aspect of evaluating a foundation's contributions, the role of the foundation's grantees as compared to that of other organizations in achieving the policy change is assessed. (See Figure 1.)
- The prominence of a foundation's role and funding in the overall policy-change effort. It is not unusual for several funders to support many of the same set of grantees in order to achieve the same or similar goals. In other instances, the number of funders is more

FIGURE 2 Spectrum of a Foundation's Funding Roles

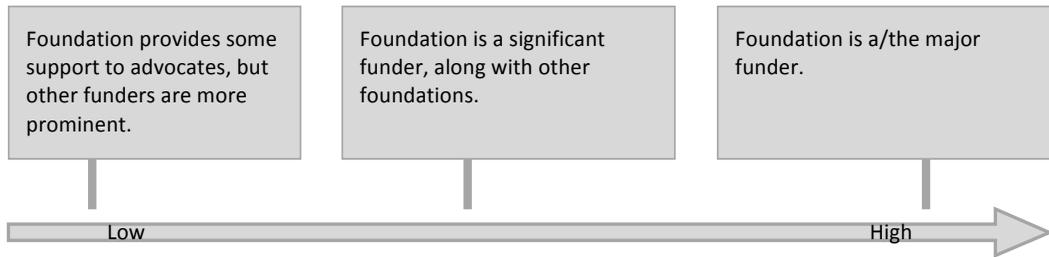


FIGURE 3 Degree of Alignment of Policy Change Goals



limited or funders may act more independently. In this aspect of evaluating a foundation's contribution, what is assessed is the role of the foundation – including the duration and level of funding – as compared to other funders in supporting the policy-change effort. (See Figure 2.) Although it may be difficult to make a direct correlation between the level and duration of foundation funding and the policy outcome, it is generally believed that the level of resources plays a significant role in an organization's or group of organizations' overall ability to advance a policy issue. (Ranghelli, 2009; Gardner, Geierstanger, Nascimento, & Brindis, 2011)

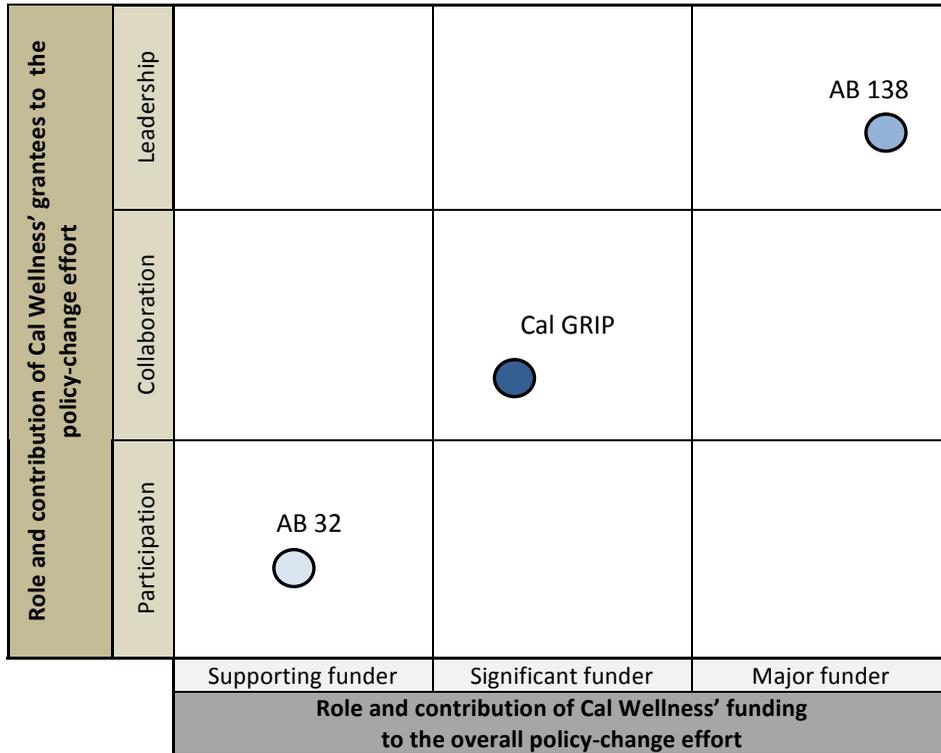
- The degree of alignment of policy-change goals with a foundation's priorities. Because Cal Wellness primarily provided grantees with core operating support, it was helpful to try to assess how tightly aligned the policy accomplishments were to the foundation's goals. In some issues, it had clearly articulated priorities; they were less well defined in other portfolios. (See Figure 3; the degree of alignment is reflected by the intensity of the color.)

The framework can visually map the role and contribution of the foundation to various policy outcomes (see Figure 4); the y-axis displays the spectrum of grantee roles (see Figure 1), while the x-axis displays the spectrum of a foundation's funding role (see Figure 2). Three policy outcomes associated with Cal Wellness' portfolios are plotted as examples:

AB 138 – the Elder Economic Planning Act

- Cal Wellness was the major funder of the effort to develop and advocate for the public policy. It funded data, research, and, subsequently, advocacy, as well as other activities to educate policymakers about the need for a new methodology for calculating the cost of living for senior citizens. The foundation also connected grantees to one another.
- The grantees initiated and championed AB 138.
- This policy outcome was moderately aligned with the foundation's policy goals regarding healthy aging.

FIGURE 4 Framework for Assessing CalWellness' Contributions to Policy Change



**The intensity of the color reflects the degree of alignment.*

Cal GRIP and Youth Development Initiative

- In response to the 2007 launch of the governor’s Gang Reduction, Intervention, and Prevention Program (Cal GRIP) and of the Los Angeles Gang Reduction Youth Development Initiative, Cal Wellness supported the creation of California Cities Gang Prevention Network; other public and private donors also supported these efforts.
- The foundation’ grantees, among others, advocated for multifaceted gang-prevention programs.
- These programs were tightly aligned with the violence-prevention portfolio’s goals.

AB 32 – The Global Warming Solutions Act

- Cal Wellness funded many advocates who worked to address the health elements and

environmental justice aspects of the act, a multifaceted, major law governing environmental policy. Numerous other funders and organizations were leaders in this effort, however.

- Although the act addresses many issues beyond the scope of Cal Wellness’ environmental health portfolio, it has the potential to improve conditions in low-income communities; therefore, it was loosely aligned with the foundation’s priorities and goals.

Evaluation Indicators and Data-Collection Methods

Guided by the two main variables of the evaluation framework – the role and contribution of the grantees and the role and contribution of the foundation – we offer some potential evaluation indicators.

Sample indicators that describe a grantee's role (see Table 1) include the advocacy activities the grantee implemented and their influence, and the relative role of the grantee compared to other organizations within the broader advocacy field.

Sample indicators that describe a foundation's role (see Table 2) include the level, duration, and type of funding; the prominence of funding relative to the philanthropic field or other donors (e.g., government, private donors); and the role of the foundation (e.g., additional nongrantmaking activities, the extent to which the foundation takes a visible stance on the issue).

The contribution framework is designed to help foundations think about their own and their grantees' roles in advancing policy change. It relies on many of the same evaluation methods and data-collection principles as other policy-evaluation approaches, including the use of multiple sources of data to triangulate and validate

the information. The framework may be used to guide a retrospective evaluation or as part of a prospective evaluation. If it is to be used retrospectively, however, identifying data upfront that would enable an assessment of the indicators will be critical.

Potential data sources include interviews, surveys, media reports, foundation documents and reports, and advocacy strategy documents. Certain evaluation methods lend themselves to this framework because they focus on providing data on the role and influence of grantees and funders in achieving their policy goal. (See Table 3.)

Contributing Along a Continuum

A foundation can play a leadership role, through the level or longevity of its funding, to the advancement of specific policy issues. Generally, these policy issues will be narrower or niche issues, in which a foundation has a clearly identified policy goal that it is supporting. In such

TABLE 1 Sample Indicators for Assessing a Grantee's Role and Contribution

Low Involvement	Significant Involvement	Leadership Involvement
<ul style="list-style-type: none"> Participated as a coalition member Provided "me too/sign on" support Tracked issue Participated in calls or meetings Provided information 	<ul style="list-style-type: none"> Dedicated staff and time Participated in advocacy strategies Coordinated closely with other advocates 	<ul style="list-style-type: none"> Played leading role in the development and implementation of advocacy strategy Played leading role in development of policy solution Coordinated advocates Was face of the issue/issue "go-to"
Policy issue not previously identified as a high priority for the organization.	Policy issue of strategic value to organization.	Policy issue highly aligned with organization and advances its goals.

TABLE 2 Sample Indicators for Assessing a Foundation's Role and Contribution

Supporting Funder	Significant Funder	Major/Leading Funder
<ul style="list-style-type: none"> Participated as one of many funders of the policy issue Funded organizations that work on the issue Actively disseminated information Provided project or core operating support 	<ul style="list-style-type: none"> Coordinated with other funders/donors Funded organizations to work specifically on the policy issue Provided convening and technical assistance for grantees Provided project or core support 	<ul style="list-style-type: none"> Acted as the only or leading funder of issue Provided long-term support of advocacy organizations or significant funds during a window of opportunity Issued press releases and op-eds Provided core operating support

TABLE 3 Potential Evaluation Methods

Evaluation Method	Grantee	Funder
<p>Landscape analysis</p> <p>An assessment of the broader field and political context to inform the position and role of the grantee relative to the broader advocacy field. The analysis can also include the foundation in relation to the philanthropic field as well as perceptions of the foundation's role by advocates and decision makers, particularly if the foundation is playing a visible and leading role (GrantCraft, 2012).</p>	X	X
<p>Stakeholder analysis</p> <p>An assessment of stakeholders invested in the advocacy intervention to determine which stakeholders in the field have power – in particular, which are aligned with an organization's interests, which are in positions of power, and which have increased connections to influence stakeholders.</p>	X	
<p>General elimination method</p> <p>An analytical process that identifies the most prominent explanation through an elimination of all rival explanations. The analysis can add to the strength of evidence for cause-and-effect relationships (Tsui, Hearn, & Young, 2014).</p>	X	
<p>Media tracking</p> <p>An assessment of media strategies through an examination of coverage on the policy issue, the advocacy players, and foundations to assess frequency, positioning, and traction (Coffman, 2010).</p>	X	X
<p>Bellwether methodology</p> <p>A determination of where a policy issue or proposal is positioned on the policy agenda, how decision-makers and other influential players are thinking and talking about it, and how likely policymakers are to act on it. The method provides data on how effective advocates have been in moving their policy issue and as a result is an effective method to use in a prospective evaluation (Coffman & Reed, 2008).</p>	X	

instances, moreover, the advocacy field tends to be relatively small and the foundation's grantees will likely be champions of the policy.

In addition to grantmaking, we recognize that foundations can demonstrate leadership by taking on new issues and elevating their profile; using its bully pulpit to take a stance and express an opinion; convening and connecting grantees and coalition building; providing technical assistance; and directly advocating for an issue itself. Although we focus on foundation funding, since that is one of the most significant tools by which a foundation expresses its leadership, there are other indicators that capture these various roles.

A foundation can also play a contributory role in the advancement of a policy change. This role is particularly relevant for major policy initiatives, such as the Global Warming Solutions Act,

in which there are many players, advocates, and funders. Enacting these types of major changes requires an enormous and sustained effort from many advocacy, policy, and research organizations, as well as from foundations and other donors that finance the effort. There are seldom singular foundation or even advocate leaders; a range of entities play different and critical roles.

Although the level of foundation leadership and support may often correlate to the leadership of the foundation's grantees, that is often not always the case; therefore, it's important to assess these dimensions independently. For example, a foundation's grantees may be leaders of a policy initiative while the funder plays a supporting role with other foundations.

The third dimension of the framework, degree of alignment, is particularly useful for foundations

that primarily provide core operating support to their advocacy and policy-change grantees. Core operating support provides organizations with the flexibility to advance policies not identified at the start of a grant period or that are necessarily highly aligned with a foundation's specific priorities. AB 138 provides a good example of this situation. The issue of measuring economic security of seniors was brought to Cal Wellness' attention through its open grantmaking process, rather than having been identified by the foundation as a policy priority. This is why AB 138 was found to have a moderate degree of alignment, even though the foundation and its grantees played leadership roles in the effort to establish an elder economic index.

In addition to enabling organizations to respond to windows of opportunity, core support helps organizations become more financially stable and, thereby, more adaptive to the changing policy environment – a critical capacity of an advocacy organization (Raynor, York, & Sim, 2009). By providing core operating support to a wide array of advocates over many years, a foundation can play an important contributory role to far-reaching laws such as the Global Warming Solutions Act.

Informing Cal Wellness' New Strategic Plan

The evaluation was conducted during the time when Cal Wellness was engaging in a new strategic planning process. Findings from various aspects of the evaluation were shared with the foundation on an ongoing basis so that it could incorporate lessons learned into the design of the new strategic plan.

Among other things, the evaluation clarified the foundation's multiple roles and contributions to policy and systems changes over the last decade. For example, although the foundation supported policy efforts across the various stages of the policy-change process (Kingdon, 1995), it played a particularly strong role in helping build advocacy capacity and elevating issues on the policy agenda. In addition, we found that the foundation contributed to policy outcomes along a continuum. It played a leadership role on many public policies

Our approach was flexible but committed, and while we didn't lead these efforts, our support of these organizations was an essential contribution to the eventual passage and subsequent implementation of the [Affordable Care Act] in California. ... However, what is perhaps more interesting is the finding that our biggest contribution to policy change was in the "laying the foundation" phase of such change. Investments in building the advocacy field, which included core support grants over a long period of time, supported grassroots organizing, leadership development, and the development and staff of coalitions. These investments were all critical to enhancing the readiness of organizations to engage in policy-change activities.

- Sandra Martinez

associated with issues the foundation had long championed and in which it had developed considerable expertise. At the same time, it made important contributions to an even greater number and range of policy changes through the provision of core support, consistent with the foundation's philosophy of grantee-led policy advocacy.

These findings are helping the foundation to think through where and how it wants to focus its efforts. Although Cal Wellness remains committed to the philosophy of grantee-led policy change and providing core operating support, it is also seeking opportunities to become more engaged and visible to help advance its top policy priorities. During this first year of implementation of the new strategic plan, the foundation is gaining a deeper understanding of many of the issues and fields that are part of the new plan. Some issue areas have mature advocacy fields, while others are more nascent. The foundation will be assessing each to determine where there are opportunities to be more directive and where it can continue to help build the field.

Using the Framework to Align Strategies With Expectations

Policy change is the culmination of a number of related activities – from policy research to coalition building to policymaker education and advocacy – by a variety of individuals and organizations. Some play visible leadership roles; others work behind the scenes. Foundations that support public-policy activities do so by supporting

We use the term “directiveness,” rather than the dichotomous terms of strategic and responsive philanthropy, to describe the degree to which the foundation or the grantees set the policy agenda and drive the strategy. Directiveness is grounded in the foundation’s philosophy and reflected in its internal grantmaking practices. In general, funders that are more directive in their grantmaking have clearly defined policy goals, often commission grants to organizations that they believe can help them to achieve those goals, and exert a greater degree of direct engagement in the policy process.

any or all of the full range of activities needed to advance policy and systems changes.

The framework makes no judgment about the value of these different roles or types of contributions. Rather, the framework is intended to help a foundation clarify its role and contribution to policy and systems changes at the outset, and then be able to assess and describe it at the end of the policy campaign or grant program. In so doing,

a foundation can then determine the kind of role and contribution it wants to make in the future and align its grantmaking strategy and practices, investments, and expectations.

Factors that influence a foundation’s role and contribution include its level of funding, other funders and organizations that relate to the particular issue, and the foundation’s philosophy on its relationship with grantees, which we call the level of “directiveness.”

We use the term “directiveness,” rather than the dichotomous terms of strategic and responsive philanthropy, to describe the degree to which the foundation or the grantees set the policy agenda and drive the strategy (Brest & Harvey, 2008). Directiveness is grounded in the foundation’s philosophy and reflected in its internal grantmaking practices. In general, funders that are more directive in their grantmaking have clearly defined policy goals, often commission grants to organizations that they believe can help them to achieve those goals, and exert a greater degree of direct engagement in the policy process (see, e.g., Salinsky, 2015). The level of directiveness may also be influenced by the external policy environment and the capacity of the advocacy field.

Different levels of a foundation directiveness correlate broadly to different quadrants of the contribution framework in terms of the policy outcomes associated with the foundation’s investments as well as the level of alignment between the foundation’s goals and the policy outcomes. As an example, Cal Wellness’ nine portfolios were implemented with varying levels of directiveness, depending on the nature and history of the foundation’s involvement with the issue, the program director, the state of the advocacy field, and external policy and political factors. The two portfolios that demonstrated the highest level of directiveness were associated with issues that the foundation had been involved with the longest and which had begun as strategic initiatives prior to the Responsive Grantmaking Program. They tended to have policy outcomes that mapped to the quadrants on the upper right side of the framework and tighter levels of alignment.

To assist a foundation in aligning its expectations with activities, we offer the following guiding questions:

Aligning Strategy, Expectations, and Funder Role in Policy Change

Goals

- What are the foundation's goals and expectations for supporting policy and advocacy activities?
- Where does the foundation want to focus – the development and implementation of specific policy change? Advancing a broad set of policies to address a major issue? Put another way, does the foundation want to achieve a few policy outcomes in the top right-hand quadrant of the framework – play a significant leadership role – or does it want to contribute to many policy changes, with those changes mapping primarily to the middle and left side of the framework and that may or may not be tightly aligned with its goals?

Roles of Foundation and Grantees Within the Public-Policy Field

- What is the current policy-advocacy landscape for the issue or field?
 - What other funders are active?
 - What organizations, including but not limited to the foundation's grantees, are involved in seeking policy change?
- Where does the foundation fit within this ecosystem and how significant will its funding be vis-à-vis other donors or funders? What role does the foundation want to play?
- Are the foundation's grantees providing leadership on the issue, or are other organizations playing more prominent roles?

Foundation Level of "Directiveness" and Alignment

- How is the foundation's involvement aligned with its philosophy and goals?
- How does the foundation engage with grantees in developing the agenda and strategy? Does the foundation generally defer to the grantees on the ground or take a more active role in shaping the policy agenda and strategy?
- How closely aligned with the foundation's goals are the public policies being sought by the advocacy field?

Conclusion

By analyzing both Cal Wellness and its grantees' roles in various policy-change efforts across the foundation's nine portfolios, a spectrum of ways in which a foundation can contribute to public

policy and systems changes emerged. There is no one way or one right approach. Rather, a foundation can play a contributory role to major policy change by providing years of core support to advocates, or it can be more explicit regarding specific policy issues about which it is concerned and play a greater leadership role. Both approaches bring value and both approaches advance policy change. In fact, both approaches are needed. Cal Wellness used several approaches based on varying circumstances, and this was reflected in the different types of contributions the foundation made.

The critical takeaway from this analysis, however, is that the foundation's grantmaking approach should be aligned with its philosophy of how change happens and how it relates to its grantees and with the external policy environment. With those considerations in mind, the foundation can develop appropriate grantmaking and ancillary strategies and set reasonable expectations for the type of impact it is seeking. We offer this framework as a tool to help foundations develop and evaluate their strategies to support the kind of contribution they are seeking to make.

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