



Assessing Your Community Foundation's Local Policy Initiative

IDENTIFYING WHERE YOU ARE, WHERE YOU MAY NEED TO GO DEEPER, AND WHAT YOUR NEXT STEPS SHOULD BE



**UPWARD MOBILITY
INITIATIVE**

Martha Fedorowicz

Today's Agenda



Welcome & Session Goals



The Policy Change Toolkit for Community Foundations



Assess Your Current Policy Work – Deep Dive on 3 Steps of the Toolkit



Q&A

Session Goals

By the end of this session, participants will:

- Become familiar with the content of the Policy Change Toolkit
- Be able to identify which steps within the Toolkit they have already completed and which they may need to delve more deeply into to develop and execute a more robust policy initiative
- Have developed a personalized list of next steps for their local policy initiatives.

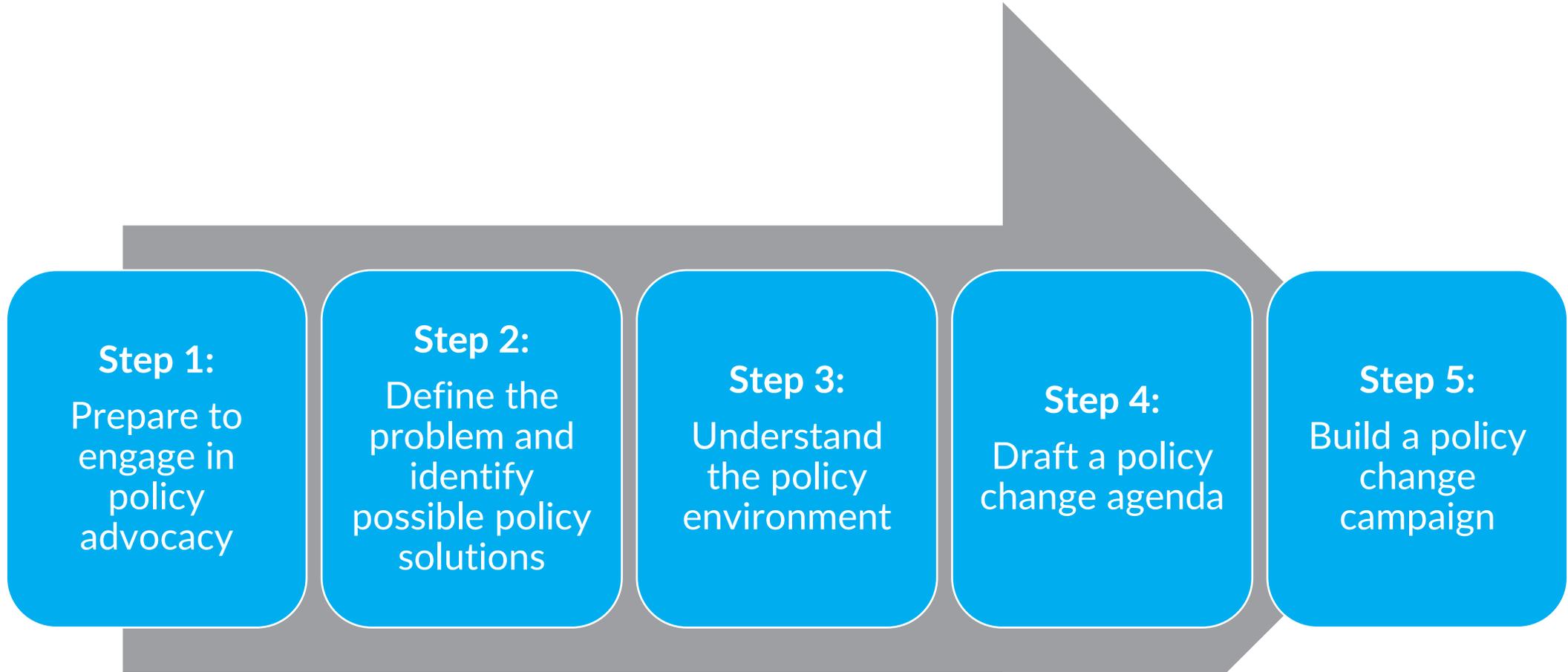


The Policy Change Toolkit for Community Foundations



How we Developed the Policy Change Toolkit

- 2023: Urban was invited to provide training to the CFON NEON Policy Working Group (PWG)
 - 9 months of training to PWG members
 - Got feedback from PWG members on how to improve our model
 - Drafted the Toolkit to disseminate our model



Step 1: Prepare to Engage in Policy Advocacy

- **Assess Readiness:** Evaluate your foundation's capacity and willingness to engage in policy advocacy.
- **Set Goals:** Define clear, achievable advocacy goals aligned with your mission.
- **Build Internal Support:** Ensure buy-in from board members, staff, and key stakeholders.

Step 1: Prepare to Engage in Policy Advocacy

TABLE B.1

Community Foundation Policy Change Capacity Assessment

	Our foundation does this, and we are confident in how we play this role	Our foundation does this, but we would love to learn more about this role	Our foundation does not do this, but we would love to learn more about this role	Our foundation does not do this, and we do not want to or cannot play this role
CONVENER: Bring government, nonprofit, foundation, and business together to address issues of importance.				
EDUCATOR: Raise awareness of policy matters with the general public, media, and policymakers.				
CAPACITY BUILDER: Provide training for foundation staff, board members, grantees on policy advocacy, working in coalitions, lobbying laws, and effective communications with policymakers.				
FUNDER: Fund advocacy and legal lobbying activities and coordinate with other funders.				



Step 2: Define the Problem and Identify Possible Policy Solutions

- **Problem Identification:** Clearly define the specific issues your community faces.
- **Research Solutions:** Identify evidence-based policy solutions that address these problems.
- **Engage Stakeholders:** Involve community members and experts in the problem-solving process.

Step 2: Define the Problem and Identify a Solution

Appendix F: The Fairfield County's Community Foundation Rationale for Action

Written by Elaine Minz and Chinedum Nnodum of the Fairfield County's Community Foundation.

Raising a child in Connecticut is more expensive than almost anywhere else in the country. Connecticut is one of only two states with a state-level income tax that does not offer any tax breaks, like a child exemption or deduction, specifically designed to ease the financial burden of raising children. Connecticut consistently ranks among the top five most expensive states for childcare (the single largest expense in most family budgets), at an average of \$16,990 a year. A permanent Connecticut Child Tax Credit (CT CTC) fills a critical gap for families, the center of Connecticut's workforce, who are struggling with the high costs of household essentials and childcare. The CT CTC provides tangible benefits for middle- and lower-income families to help offset the high costs of raising kids in our state. The design of the CT CTC reaches a broad base of families and is particularly impactful for Black, Latino, and other historically marginalized people who face disproportionate and considerable economic hardship.

Connecticut's childcare issues are heavily influenced by three key factors:

- Connecticut has an exceptionally high level of economic inequality
- Connecticut has an unfair tax system
- Connecticut has an unfair spending system

Connecticut's exceptionally high level of economic inequality contributes to poverty and makes it more difficult for low- and middle-income families to make ends meet. Connecticut's unfair tax system exacerbates economic inequality and poverty and, at the same time, funds Connecticut's unfair spending system, which was recently locked into place for several years.

As of 2021, the latest year data available, Connecticut has the third highest level of pre-tax income inequality out of all 50 states during a period of historic income inequality in the US as a

Step 3: Understand the Policy Environment

- **Political Landscape:** Analyze the local political context and identify key policymakers.
- **Policy Mapping:** Map out existing policies and gaps that your advocacy can address.
- **Stakeholder Analysis:** Identify allies, opponents, and neutral parties.

Step 3: Understand the Policy Environment

Appendix I: Policy Ecosystem Mapping

This worksheet is designed to walk you through an exercise that will allow you to identify the various forces that affect your policy change ambitions within your community ecosystem and how to overcome them.

First, name the policy change you want to make in the blue policy box below:

Responsible Actors

Brainstorm a list of actors that are involved in this policy issue. Put one actor per cell.

Who in your community cares about this issue?

Brainstorm a list of forces that are at play in this policy issue. Put one force per cell.

What forces could create action or inaction on this issue?



Step 4: Draft a Policy Change Agenda

- Basically, a public facing version of your Rationale for Action that includes information from your Ecosystem Mapping exercise
 - What partners you will engage in your advocacy work
 - What window of opportunity you will leverage

Step 5: Build a Policy Change Campaign

- **Campaign Strategy:** Outline your strategy for mobilizing support and influencing policymakers.
- **Coalition Building:** Form alliances with other organizations and community groups.
- **Advocacy Tactics:** Use a mix of tactics such as engaging with elected officials, public education, and media outreach.
- **Evaluation:** Plan for monitoring and evaluating the impact of your advocacy efforts.

Step 5: Build a Policy Change Campaign

Appendix K: Policy Change Campaign Template

This policy change campaign template represents the fifth and final step in the strategic policy advocacy engagement process. While this resource can be used as a stand-alone tool for your policy change efforts, you should familiarize yourself with the recommended processes in previous four steps. It will not only enrich your use of this template but also empower you to navigate the intricacies of your policy change campaign with informed precision and strategic impact.

What Is a Policy Change Campaign?

The policy change campaign lays out a process for *how* your foundation will get your selected policy passed. Specifically, it

- acknowledges barriers or roadblocks and addresses how your team will attempt to overcome those barriers,
- describes the policy change campaign activities your foundation will undertake,
- outlines the key steps needed to advance the policy change campaign and the actors responsible for leading those steps,
- sets milestones for policy adoption, and
- identifies measures of success.

As a tactical plan, the policy change campaign is intended to be an internal document and should not be shared outside of your foundation.

Step 1: Assess Your Barriers or Roadblocks

Certain policy change factors may inhibit or block you from getting your selected policy passed, such



The background is a solid blue color with a faint, stylized illustration of a city. The illustration includes various buildings, trees, and people. There are mountains in the distance, a clock tower, a hospital with a cross, a person on a bicycle, a person in a wheelchair, and a person walking. The overall style is flat and modern.

Assess Your Current Work: Deep Dive on 3 Steps of the Toolkit



The Policy Advocacy Engagement Checklist

<https://www.urban.org/research/publication/policy-change-toolkit-community-foundations>



BOX 2

Policy Advocacy Engagement Checklist

Step 1: Prepare to Engage in Policy Advocacy

- Has your community foundation completed an internal policy change capacities and priorities assessment?
- Does your foundation have an established policy advocacy decisionmaking process?
- Does your foundation have a process to assess the fit of policy advocacy activities (i.e., their alignment with the foundation's mission and vision)?
- Does your staff/board/foundation leadership understand your policy change capacities and internal policies?
- Has your board of directors authorized the specific policy advocacy being considered?
- Does your foundation have the internal resources to address or engage in policy?

Step 2: Define the Problem and Identify a Policy Solution

- Has your community foundation or its partners collected and translated available data to clearly understand the policy problem?
- Does your foundation clearly understand who is most impacted by the policy problem?
- Has your foundation conducted community engagement, engaged your community advisory board, or consulted recent community engagement reports to learn about the lived experience of people who have encountered the problem of interest?
- Have you identified a clear policy solution that has evidence to support its efficacy? If the solution is novel, have you collected evidence to suggest its potential?
- If you have identified a policy that you would like to support, have you reflected on who will not be served by this policy? If they are a key population for whom you are hoping to create better outcomes, how might you support other systems changes to accompany the policy change?

Step 3: Understand the Policy Environment

- Does your community foundation have a strong understanding of the local and national champions and opponents of your selected policy change?
- Has your foundation completed a policy ecosystem map?
- Do you know who your allies are and what actions they have already taken regarding this policy problem?

Step 1: Prepare to Engage in Policy Advocacy



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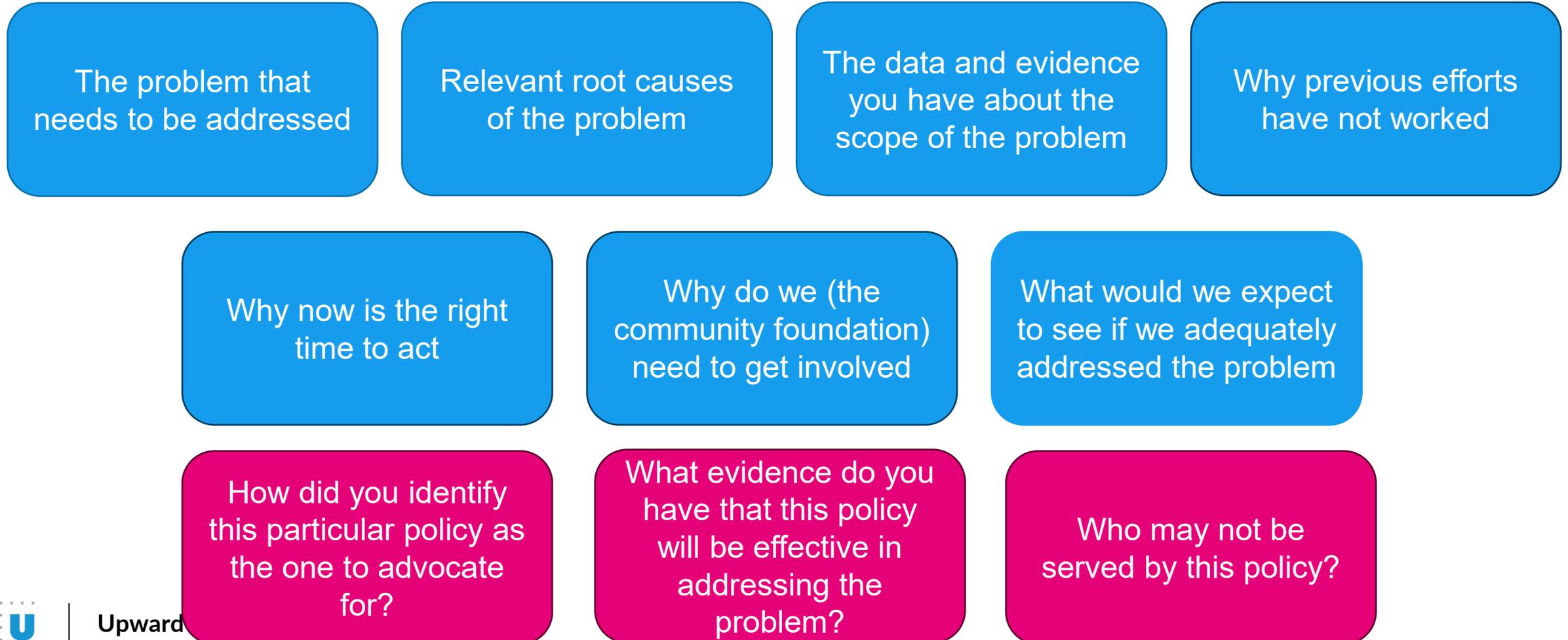
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Writing a Strong Rationale for Action

There are 10 elements that should be included in a strong rationale for action:



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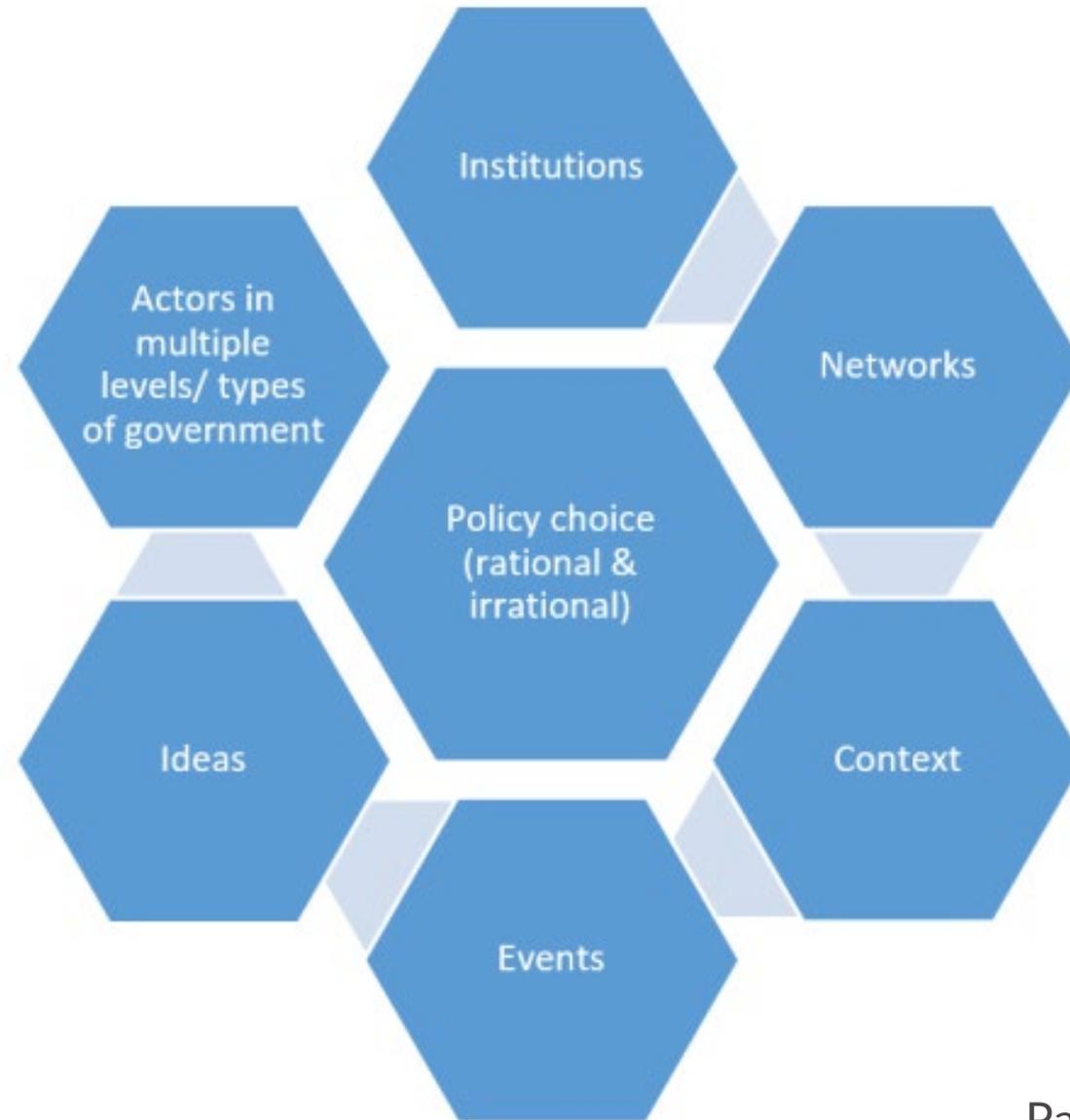
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Policy Ecosystem



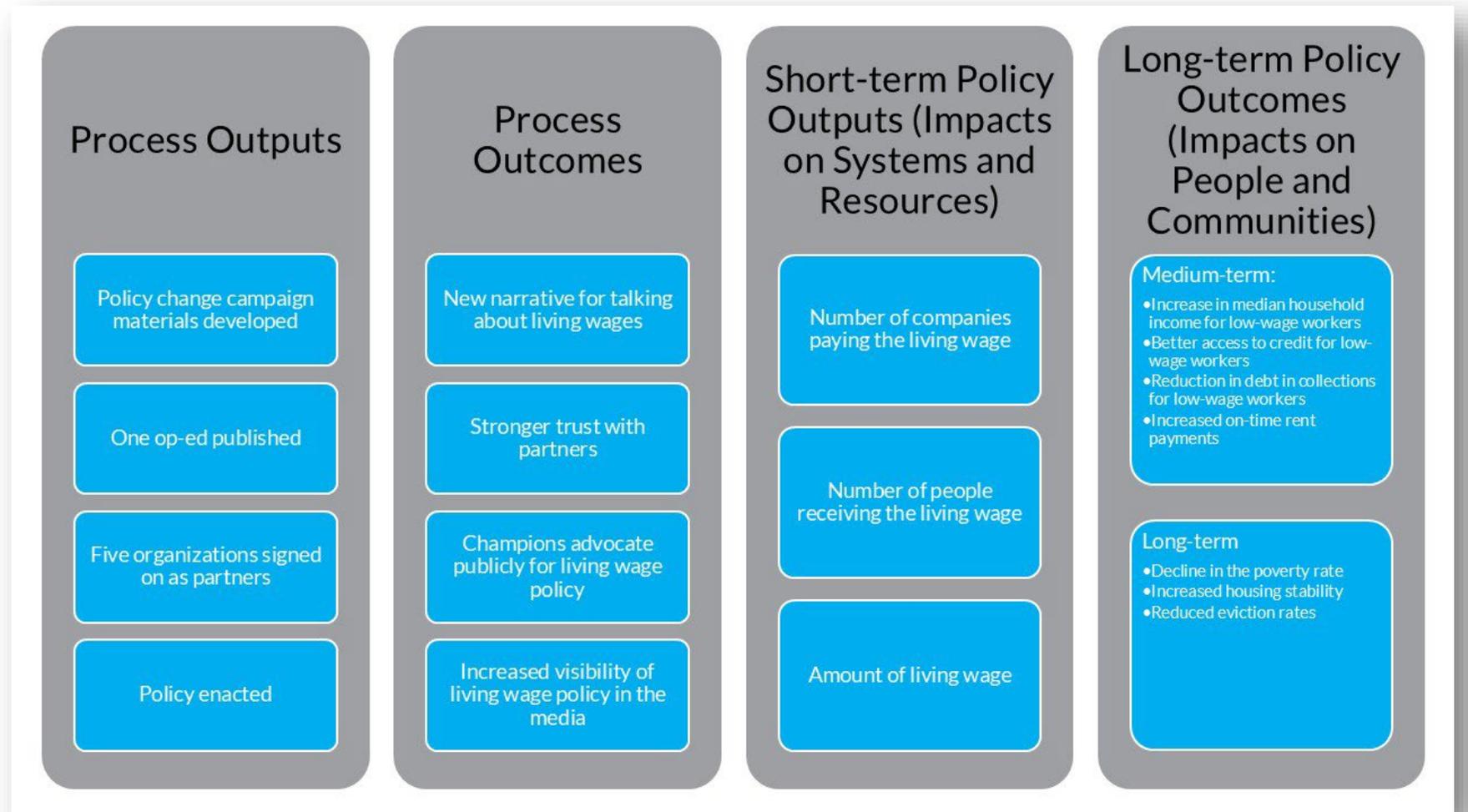
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Wrap Up and Q&A



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