

  
**KATE B. REYNOLDS**  
CHARITABLE TRUST



**APHA 135TH ANNUAL MEETING AND EXPO**  
**NOVEMBER 3-7, 2007 WASHINGTON, DC**

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# Agenda

- I. KBR Background
- II. Case Example - Impacting Health Policy
- III. Private Foundation's Role in Policy
- IV. Tips for Working with Foundations
- V. Resources

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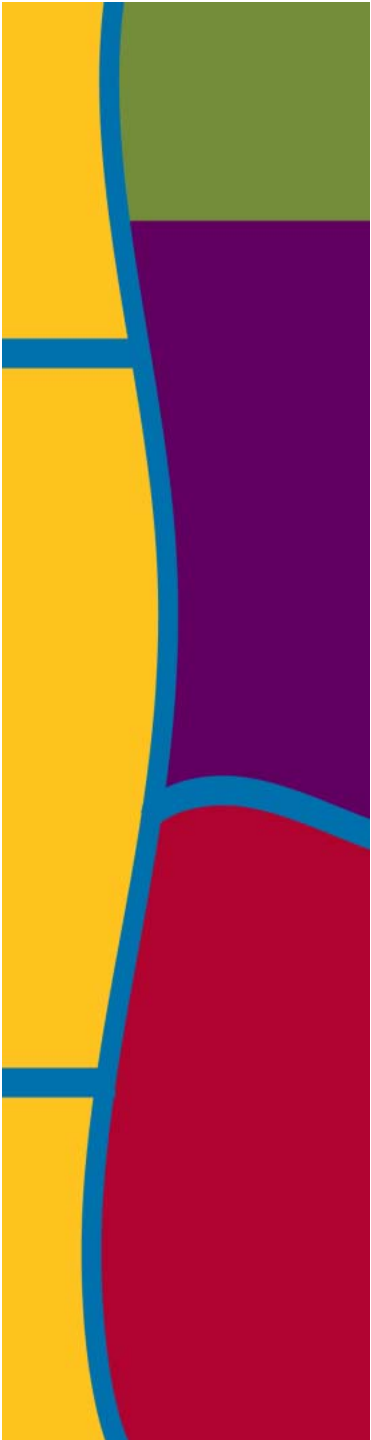


# KATE B. REYNOLDS CHARITABLE TRUST

- Private, State-wide
- Health Care Focus
- Over \$620 million in assets
- \$30 million in grants annually



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# Case Example – NC Center for Public Policy Research

- Organizational Background  
Web site: [www.nccppr.org](http://www.nccppr.org)
- Project Background

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# Project Objectives

1. Conduct research on key public policy issues affecting victims of domestic violence
2. Raise the level of public debate and move the issue of domestic violence on the public agenda
3. Clarify which policy issues need the attention of public officials and, if possible, improve public policy affecting victims of domestic violence

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# Outcomes – #1

## Conduct research

- Produced and published major study
- Researched the extent of domestic violence in NC
- Researched the demand and gaps in services



# Outcomes – #2

## Raise Public Debate

- State-wide coverage on 90 radio stations in the NC Radio News Network
- Half-hour to one hour radio programs on 4 stations

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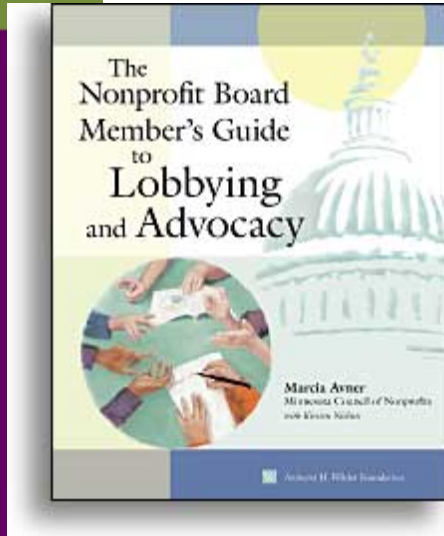
# Outcomes – #3

## Public Official and Policy Change

- Made 9 Policy Recommendations
- NC General Assembly approved a bill in August 2005 to expand family courts to additional jurisdictions and create a joint House and Senate study committee to continue working on DV issues; also addressed children.



# Private Foundations – Role in Policy?



Three major phases of public policy development:

- the investigative phase
- the action for change phase
- the implementation phase

*Foundations can play a role in any or all of them.*

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# Investigative Phase

## Phases of Public Policy Development

Identify public problem (or opportunity)

Determine who is affected and involved in the issue

Gather information about what options and solutions exist

Bring key players together for deliberation and discussion

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# Action For Change Phase

## Phases of Public Policy Development

Plan for public policy and civic action

Build the capacity of groups that will engage in advocacy

Organize and mobilize activities to influence government, media (and possibly business and nonprofit) decision makers

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# Implementation Phase

## Phases of Public Policy Development

Work with agencies and other groups to put the agreed upon change into place

Evaluate and track results



# Tips for Working with Foundations

**“Philanthropic leadership in the twenty-first century demands that we become more involved in the public policy process. .”**

Steve Gunderson, President and CEO, Council on Foundations

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## DO'S LIST

- Read all the materials that the foundation or other funder has published. **Know the legal limits of policy work for foundations.**
- Start talking to the foundation representatives well before their deadlines and before your proposed project start dates.
- Develop a system within your organization that identifies potential projects early on and is prepared when opportunities present themselves. Have a system whereby people involved in accounting, finance and other areas of operations can respond quickly and knowledgably to the needs of the funders.



## **DO'S LIST (continued)**

- Commit time and work to participation in community or regional networks relevant to health and human service issues.
- Enhance your knowledge of the people you currently serve and those who you are not currently serving.
- Demonstrate an in depth knowledge of what other services are being offered in the community.



# Other Important Information

- Realistic goals
- Leadership—management/board
- Financial viability
- Collaboration
- Sustainability
- Local commitment, including organization putting in some of their own money

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## DON'TS LIST

- Call a foundation saying that you need money for XYZ.
- Use the names of elected officials of other prominent persons unless you are absolutely sure of the relationships in the community.
- Try to shame the foundation person into acknowledging the need for your project.
- Request funding for items or program areas that the foundation does not fund.
- Criticize the efforts of others.
- Get consultants involved as spokespersons.



# In Closing

**“Through our public policy grantees, we have seen policies enacted that can improve the health of far more Californians than we could ever hope to have reached through funding direct service alone.”**

Gary L. Yates, President and CEO,  
The California Wellness Foundation

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# Additional Resources

- *Public Policy Grantmaking Toolkit* by Northern California Grantmakers, <http://www.ncg.org/toolkit/home.html>
- *Funding Health Advocacy* by Grantmakers in Health, [http://www.gih.org/usr\\_doc/IssueBrief21\\_Funding\\_Advocacy.pdf](http://www.gih.org/usr_doc/IssueBrief21_Funding_Advocacy.pdf)
- *Foundations & Public Policymaking* by the University of Southern California, <http://www.usc.edu/schools/sppd/philanthropy>
- Council on Foundations  
[www.cof.org](http://www.cof.org)  
Their public policy web page includes key resources for foundations including information about foundations that have been nationally recognized for their work in the public policy arena.
- W.K. Kellogg Foundation  
[www.wkkf.org](http://www.wkkf.org) - Their Policy Toolkit provides "worry-free" lobbying advice.
- *Power in Policy; The Lobbying and Advocacy Handbook for Nonprofit Organizations* and *The Nonprofit Board Member's Guide to Lobbying and Advocacy*—are designed to help grantmakers, nonprofit organizations, and nonprofit board members understand their crucial role in influencing public policy through the legal tools available to them.



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