



## Advocacy Capacity-Building Technical Assistance Opportunity

### Initiative Overview

Since their inception, the Health Care Foundation of Greater Kansas City and REACH Healthcare Foundation have offered their grantees multiple training and educational opportunities to encourage participation in the policy and advocacy fields. We have learned alongside our grantees that succeeding in these arenas requires not just increased knowledge but also strong nonprofit organizations with the skills, tools, and integrated practices that allow them to leverage their strengths and translate their expertise into community impact. To this end, we hope to move beyond these training and educational opportunities and provide a small cadre of grantees with the opportunity for intensive technical assistance to work toward more robust engagement in public policy, advocacy, and social change. This opportunity is not intended for those grantees that are primarily advocacy organizations; rather it is targeted toward direct service providers, community-based organizations, and other collaborative efforts that seek to initiate or develop policy advocacy capacity.

The proposed outcomes of the project are:

1. Nonprofit organizations will be prepared to effectively advocate for program/policy needs that benefit poor and underserved individuals in the foundations' six-county service area.
2. Participating organizations will complete an assessment, pinpoint their organization's advocacy strengths and weaknesses, develop a work plan around a particular goal, and gain know-how on effective engagement of their constituency.

### Initiative Team Leaders

The Advocacy Capacity Initiative is directed by **Jessica Hembree**, Program and Policy Officer at the Health Care Foundation of Greater Kansas City and **Pattie Mansur**, Communications Director at the REACH Healthcare Foundation. The designated technical assistance provider is **Melinda Lewis**, an adjunct professor at the KU School of Social Welfare, nonprofit consultant, and long-time member of the nonprofit advocacy community.

### Technical Assistance Application

This technical assistance opportunity is designed to help nonprofit organizations address structural issues, policies, and practices that affect the practice of social change, including policy advocacy and lobbying. NOTE: This opportunity provides for technical assistance, not direct financial awards for organizations or programs.

Organizations must be current grantees of the Health Care Foundation of Greater Kansas City or the REACH Healthcare Foundation. Agencies whose prime function is policy advocacy are not eligible to apply.

For 2013, **up to five organizations will be selected** to receive customized technical assistance for a maximum 12-month period. Successful applicants will:

1. Receive up to 12 months of consulting and technical assistance services provided by a skilled consultant.
2. Complete an advocacy capacity self-assessment to pinpoint the organization's advocacy strengths and weaknesses and support development of a work plan around particular goals. This will allow each grantee to address the particular competencies, organizational practices, and patterns of thinking that facilitate advocacy success. Together with the identified consultant, the organization will demonstrate progress toward the work plan during the course of the contract.
3. Work with the technical assistance provider to identify and implement improvements. Technical assistance plans will be developed in partnership with the organization's leadership and board.
4. Agree to participate in evaluation activities that will help the Health Care Foundation of Greater Kansas City and REACH Healthcare Foundation understand needs in this area of work, including a mid-course convening alongside the other technical assistance grantees and a concluding convening to share experiences and findings from the project.

**The application package consists of:**

1. A completed organizational advocacy assessment (attachment A).
2. A narrative statement.

**The narrative statement should not exceed three pages and should address the following:**

1. Briefly describe your organization, including mission, vision, and history. Discuss your organization's policy, advocacy, and social change efforts to this point. In what ways does your organization attempt to tackle the root causes of the barriers impact your constituents? How do your programs and services work to achieve your vision and to promote social change?
2. Describe candidly the conditions within your organization and/or local community that explain your interest in this initiative, and how you see technical assistance benefiting your organization and your target population.
3. Based upon the completed advocacy self-assessment, provide a profile of your organization's strengths and weaknesses. What immediate (within the following 12 months) technical assistance will help strengthen your ability to engage in meaningful social change work?

4. Explain how your organization will allocate staff resources for this project and your organization's capacity to continue efforts beyond the technical assistance period. We are particularly interested in your Board's commitment to providing leadership and direction for this project.

**Applications will be reviewed based on the following criteria:**

1. Evidence of organizational readiness (including the commitment of the board of directors) to engage in an organizational assessment process and adjust policies, practices, and resources to advance social change.
2. A completed and thoughtful advocacy capacity self-assessment, as well as a clearly identified technical assistance need that can be at least initially addressed within the scope of this project.
3. Commitment to continue social change efforts beyond the technical assistance support.

**Guidelines and Timeline for Submission**

**Proposals must be received by 12 p.m. on Friday, October 26, in order to be considered.** Proposals may be submitted by mail or email addressed to:

Pattie Mansur  
REACH Healthcare Foundation  
6700 Antioch Road, Suite 200  
Merriam, KS 66204  
pattie@reachhealth.org

**Timeline**

Technical Assistance Application Release	September 25, 2012
Application Deadline	October 26, 2012
Notification of Award	December 7, 2012
Award Term	January 1, 2013 to December 31, 2013

**ATTACHMENT A: Organizational Advocacy Assessment**

Although this information will be used to evaluate your proposal and your technical assistance needs, we want to assure you that there are no “right” or “wrong” answers.

**Organizational Advocacy Capacity Assessment**

Name of Applicant Organization:	
Primary Contact and Title:	
Phone:	Email:

We have a decision-making structure that supports and manages our advocacy work.

- 
- In Good    Yes, but    Not Yet    Don't  
Shape      Needs                      Know  
            Work

Our mission statement includes advocacy as part of our work.

- 
- In Good    Yes, but    Not Yet    Don't  
Shape      Needs                      Know  
            Work

There is strong commitment on our Board for advocacy.

- 
- In Good    Yes, but    Not Yet    Don't  
Shape      Needs                      Know  
            Work

We have a written agenda adopted by our board that identifies the organization's priorities for legislative and other types of advocacy.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We have elected to use the 501(h) expenditure test, if appropriate, to measure our lobbying limits.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We have at least one staff person whose job description includes specific responsibilities for advocacy.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We have one or more networks of individuals that we can and do mobilize in support of our advocacy activities.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

Our organization regularly identifies and coordinates efforts with other stakeholders, coalitions and advocacy organizations.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We have a process to help us assess the advocacy landscape in our field and to adapt our strategies accordingly.

                

In Good    Yes, but    Not Yet    Don't  
Shape      Needs                   Know  
                 Work

We identify, build, and maintain working relationships with appropriate policymakers who influence decisions related to our advocacy objectives.

                

In Good    Yes, but    Not Yet    Don't  
Shape      Needs                   Know  
                 Work

Our organization's process for guiding our advocacy priorities and tactics is flexible and allows for quick changes amidst the dynamic policy environment.

                

In Good    Yes, but    Not Yet    Don't  
Shape      Needs                   Know  
                 Work

We evaluate our advocacy efforts and incorporate what we learn in our efforts.

                

In Good    Yes, but    Not Yet    Don't  
Shape      Needs                   Know  
                 Work

We include policy updates in our regular communication with clients, board members, volunteers and other supporters.

                

In Good    Yes, but    Not Yet    Don't  
Shape      Needs                   Know  
                 Work

We provide opportunities for our staff to learn more about the structural and underlying causes impacting our area of focus.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We actively encourage and support our clients/constituents to advocate for policy change.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know

We have systems in our programs that help us to identify advocacy needs and to leverage our work to promote social change.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Good Shape	Yes, but Needs Work	Not Yet	Don't Know