

Building Capacity for Public Policy

About this Tool Kit

This tool kit reviews the factors we found to have the greatest impact on improving organizational capacity to engage in public policy. It shares the lessons learned by state association of nonprofits that participated in a three-year initiative, Building Capacity for Public Policy. An extensive evaluation of the initiative identified indicators that are key to successful public policy efforts.



About NCNA

With a mission to advance the vital role and capacity of the nonprofit sector in civil society and support and give voice to state and regional associations of nonprofit organizations, the National Council of Nonprofit Associations (NCNA) serves as a credible voice and champion for the nonprofit sector.

A 501(c)(3) membership-based organization, NCNA represents a network of 38 state and regional associations of nonprofits serving over 22,000 charities nationally. NCNA and its members support the nonprofit sector by providing cutting edge training and technical assistance to public charities, advocating for and raising awareness of sound public policies at the state and national levels, and promoting the value, merits, and impact of nonprofits broadly.

About SPARC

The State Policy Action Resource Center (SPARC), the policy arm of NCNA, helps state and regional associations—and their members—make an impact on legislative issues and public affairs. SPARC monitors and analyzes major state and federal public policy issues impacting the nonprofit sector. This work has enabled NCNA to emerge as a major source of policy information affecting nonprofits across the country.

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Background: Building Capacity for Public Policy Initiative

The nonprofit sector is important to a successful democracy; it has been called a cornerstone of civil society and civic engagement through its public policy and advocacy role. One of the most important functions of the nonprofit sector is to advocate for the advancement of the issues and concerns of its constituencies and clients. Nonprofits have a duty to stand up and speak out for the public good, not only in times of crisis but also in times of prosperity. Previous advocacy efforts have proven to be an effective method to promote a more just and equitable society. Nonprofit advocates often provide a voice for those individuals and groups who are unable to speak for themselves because they do not have power or access. Nonprofits leaders have long recognized the need to direct attention to provide and promote solutions to the lingering systemic social and economic domestic issues of our country. This shift requires the incorporation of public policy and advocacy as a part of organizational priorities.

Understanding this challenge the National Council of Nonprofit Associations (NCNA) and Independent Sector (IS) launched Building Capacity for Public Policy (BCAPP), a three-year initiative designed to increase the engagement of nonprofit organizations in public policy by developing the public policy capacity of state associations of nonprofits. The specific goals of the project were to:

- Strengthen the public policy capacity of state associations and local coalitions of nonprofits.
- Develop a comprehensive communication network to link organizations working on federal, state and local policy issues.
- Develop and strengthen expertise in state nonprofit associations on policy issues.
- Develop and promote an affirmative public policy agenda for the sector.

The state association network was an appropriate partner in this initiative given their leadership role at the state level. Many in the state association network have long been involved and respected for their work in public policy and advocacy on sector-wide issues on behalf of their nonprofit members. Through this initiative, six state associations, who had little or no public policy experience, received direct grant support to build their public policy capacity. Each group submitted a proposal that outlined their current capacity and plans to increase this capacity. In addition to grant support they received specialized training, individualized consultations, regular and frequent communications via listservs, and access to GiveVoice.org, an advocacy and communication tool, developed specifically for the BCAPP initiative which is available to the entire state association network.

During the three-year initiative an intensive process and outcome evaluation was performed. While BCAPP was aimed at state associations of nonprofits, the lessons learned are important to all nonprofits interested in building an effective public policy program. This tool kit shares the lessons learned and encourages others to develop their capacity for effective advocacy.

Indicators for Success to Build Public Policy Capacity

An extensive evaluation of the Building Capacity for Public Policy (BCAPP) project identified eight indicators of capacity for state associations to effectively engage in public policy. The source of information was provided by the stakeholders in the BCAPP initiative including National Council of Nonprofit Associations (NCNA), Independent Sector, and state associations (those that participated in BCAPP and others). The lessons learned are applicable to any nonprofit organization trying to focus their efforts, to evaluate their readiness to engage in or to enhance their public policy efforts. The eight indicators of capacity for state associations to effectively engage in public policy are:

- **Organizational Commitment to Public Policy** - a long-term commitment to engaging in public policy, and make it a strategic priority for the organization.
- **Decision-Making Structures** - that can support and manage public policy activities, including establishing policies to guide advocacy work.
- **Policy Agendas** - clearly defined to guide public policy activities. These policy agendas must allow for flexibility in shifting priorities to respond to pressing issues as they arise.
- **Relationships with Nonprofits, Government Agencies, and Policymakers** – ability to build relationships with and establish partnerships and coalitions with other nonprofits. Relationships and credibility with the targets of advocacy efforts—government agencies and policymakers—are also important.
- **Organizational Resources to Engage in Public Policy** - dedicated financial resources specifically to supporting public policy activities. This could include hiring dedicated public policy staff or contracting with a lobbyist.
- **Communication Skills and Infrastructure** - staff skilled in communicating with policy makers, as well as an infrastructure for communicating regularly and in a timely fashion with both members and policymakers.
- **Knowledge of State, Local and National Politics** – an understanding of the political climate within which you work and the ability to develop strategies that are appropriate to this environment. This perhaps the most difficult indicator to assess given that it essentially involves measuring political savvy, confidence, and sophistication.
- **Technical Expertise Related to Public Policy**- an understanding of the technical areas related to public policy, including the legislative process, tax and budget policy and the budget process, and general policy issues concerning the nonprofit sector in their state.

Through the course of the initiative, BCAPP partners learned that they must deal with each of these indicators in an effective manner in order to move their program forward. Building the foundation to assure future success is vital for any organization and this tool kit is designed to assist organizations succeed in their efforts. The following sections offer valuable “advice” to organizations on how to efficiently spend time, efforts and resources to maximize results and minimize failure. The format for each capacity indicator is as follows:

- Effective practice: defines the indicator.
- Lessons learned from the BCAPP Partners.
- Activities to build indicator capacity: these are examples of activities to consider to improve your public policy capacity. It is not expected that organizations will have all of these in place.
- Resources for learning more about increasing your capacity on a specific indicator.

It is our hope that this tool kit can be a helpful resource for organizations engaged in or interested in public policy regardless of their level of development.

Key Indicators of Public Policy Capacity Building

Self-Assessment Tool

Directions: This tool is designed help organizations rate their current capacity with the eight indicators of success in building public policy. Your assessment will help you utilize this tool kit more effectively to focus on the areas where you need the most support. To determine which rating level fits your organization respond to the questions in terms of the actions and/or processes that reflect your current level of activity. Total your ratings and review results at end for your score.

Please use the following scale:

1=Not in place or in
planning stage

2= Partially in place with
an implementation plan

3= Solidly in place and
consistently implemented

Remember to circle the rating that reflects your organization's current capacity

Indicator	A	B	C
Organizational Commitment - a long-term commitment to making public policy a strategic priority for the organization.	1	2	3
Decision-Making Structures - to support and manage public policy activities.	1	2	3
Policy Agendas - a clearly defined policy agenda to guide public policy activities.	1	2	3
Relationships with Nonprofits, Government Agencies, and Policymakers - establish partnerships and coalitions with other nonprofits and relationships and credibility with policymakers.	1	2	3
Organizational Resources to Engage in Public Policy - dedicate financial resources specifically to supporting public policy activities.	1	2	3
Communication Skills and Infrastructure - staff and infrastructure for communicating regularly and in a timely fashion with both members and policymakers.	1	2	3
Knowledge of State, Local and National Politics - understanding of the political climate and the ability to develop appropriate strategies.	1	2	3
Technical Expertise Related to Public Policy – understanding of the technical areas related to public policy, including the legislative process, tax and budget policy, the budget process and general policy issues.	1	2	3
Totals:			
Total A+B+C Columns:			

Scoring –

24-19: Excellent - Your organization has made a great investment in building a successful public policy program. You have managed to achieve a level of success in all of the indicators, this tool kit can help you refine the work that you are doing and offer suggestions to further improve your efforts.

18-13: Good - Your organization has achieved success in some of the key indicators. Your attention to other activities outlined in this tool kit with further advance your public policy capacity in the indicators where you do not have consistency.

12-9: Improvement needed - You have started the process of building a successful public policy program but need to strategically invest more time and energy into your organizational efforts. This tool kit can help you strategize and focus as you move forward.

8 or below: Capacity building needed -Your organization is at the beginning stages. If you seek to build a strong public policy program you will need to invest in making public policy a priority. Follow the steps in this tool kit to get the right start to success.

Organizational Commitment to Public Policy

Effective practice: To engage effectively in public policy work, organizations need to have a long-term commitment to engaging in public policy, and to make it a strategic priority for the organization.

Lessons learned: Participation in the Building Capacity for Public Policy project enhanced organizational commitment to public policy work for all partners. It was reported that boards became more involved in policy work, including: serving on or even chairing policy committees, approving policy agendas, reviewing legislation, signing on to support letters, policy work integrated into committee work. It is also clear that public policy work became more central to the organization's work. For example, partners have had specific sessions on public policy to their annual conferences and feature public policy issues more prominently in their newsletters and websites.



Organizational commitment is the first step in successfully engaging in public policy and advocacy. If the staff and board have not agreed that this is a priority of the organization, then any activities will only be done in a limited and haphazard fashion. Policy and advocacy must be included in planning for the organization and assigned to a staff or board member, who is accountable to the organization for making this happen.

Activities to build indicator capacity:

- Obtain a board resolution to commit to public policy as a priority for the organization.
- Have the board mandate a policy committee.
- Build public policy into the organization's long-term strategic planning.
- Dedicate a staff person or board member to work on policy.
- Engage board members to serve on policy committees.
- Include policy sessions at your annual meetings.
- Add a policy section to your website.
- Add policy news to your newsletter.
- Add advocacy statement to your mission statement.
- Incorporate policy work into by-laws (e.g. role for policy committee).

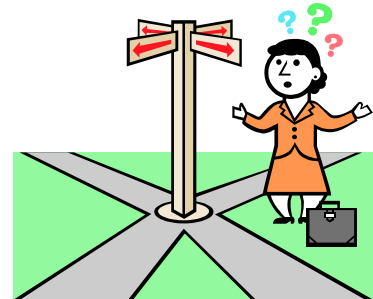
Resources

- *The Nonprofit Board Member's Guide to Lobbying and Advocacy*, Marcia Avner with Kirsten Nielsen, Wilder Foundation 2004 PP. 13-27. Order at www.wilder.org/pubs.
- *The Lobbying and Advocacy Handbook for Nonprofit Organizations*, Marcia Avner, Wilder Foundation, 2002, PP. 21-33. Order at www.wilder.org/pubs.
- NCNA strategic plan, <http://www.ncna.org/index.cfm?fuseaction=Page.viewPage&pageId=432>.
- *Organizing for Social Change: Manual for Activists*, Kim Bobo, Jackie Kendall, Steve Max, 2001, PP. 182-192. For ordering information go to www.midwestacademy.com.
- *A Voice for Nonprofits*, Jeffrey M. Berry with David Arons 2003. The Brookings Institute. Order from the Brookings Institute www.brookings.edu.
- *So You Want to Make a Difference*, Nancy Amidel 1991. 14th Edition published in December 2002. OMB Watch, PP. 33-43. <http://www.npaction.org/article/articleview/191/1/194/>.

Decision-Making Structures

Effective practice: To engage effectively in public policy work, organizations need to have a decision-making structure in place to support and manage its public policy activities, including establishing guidelines and policies to direct advocacy work.

Lessons learned: All Building Capacity for Public Policy partners developed or reconstituted their public policy committees. In doing so, they expanded and implement more strategic recruitment for committee membership, including greater representation from various sub-sectors and regions of the state. For example, one partner’s public policy committee became “so popular” that it had to create an application process for prospective members and term limits for existing members. Several partners developed clear responsibilities and job descriptions for committee members, as well as sub-committee structures and policies and guidelines for addressing public policy issues. Several partners noted that if they were to set up their policy committees over again, they would recruit people with knowledge and experience in policy advocacy, and not just an interest in the issues.



Activities to build indicator capacity:

- Develop an advisory body to guide the work of the staff. There are key decisions that you have to make before you develop this advisory group.
 - Get approval and buy-in from your governing body or board.
 - How does this committee fit into organization’s governance structure? Include a description of their role in your organization in the by-laws.
 - What is the purpose of this group? Develop a job description for the committee, include how much of a commitment you expect (e.g. attend monthly meeting).
 - How large do you want this group to be? Do you want all subsectors represented?
 - Is it open membership or is their an application process?
 - Strategic recruitment of members- Be clear upfront if you want people with knowledge and experience in policy and advocacy or just someone who is interested in policy?
- Once the committee is in place:
 - Choose officers.
 - Set a schedule of meetings.
 - Design statement of principles encompassing the core beliefs and guiding principles of organization’s public policy activities. This statement will be very helpful as you design policy agenda and policy priorities.
 - Develop a decision making process to guide staff when making policy decisions. This can be vital as issues that need a quick decision can arise.

Resources:

- *The Lobbying and Advocacy Handbook for Nonprofit Organizations*, Marcia Avner, Wilder Foundation, 2002, PP. 33-85. Order at www.wilder.org/pubs.
- *The Nonprofit Lobbying Guide*, Bob Smucker, Independent Sector, 1999. PP. 42-48. Available for download at: <http://www.clpi.org/toc.html>.
- NCNA Rules and Responsibilities for Public Policy Committee, <http://www.ncna.org/uploads/documents/live//roles%20and%20responsibility%20of%20PP%20committee.doc>.
- Ohio Association of Nonprofit Organizations Policy Working Group, <http://www.oano.org/policy.asp?page=WG02>.
- Council of Community Services of New York Policy Cabinet, http://www.ccsnys.org/np_policy_cabinet.htm.
- Maryland Association of Nonprofit Organizations Principles for Public Policy Action, http://www.marylandnonprofits.org/html/policy/02_01.asp.
- Vermont Alliance of Nonprofit Organizations Statement of Policy Goals, <http://www.vanpo.org/vanpo.asp?pagename=positionstatements>.
- NCNA Statement of Principles, <http://www.ncna.org/index.cfm?fuseaction=Page.viewPage&pageId=191>.

Policy Agendas



Effective practice: In order to successfully engage in public policy nonprofits must have a clearly defined policy agenda in place to help structure public policy activities. These policy agendas must allow for flexibility in shifting priorities to respond to pressing issues as they arise.

Lessons learned: During the grant period, all Building Capacity for Public Policy partners developed a public policy agenda. For most this was a challenge, due to the fact that “no one in their states has ever focused on sector-wide issues before.” Some used innovative ways to obtain member input into that agenda (e.g., a Policy Council). Most reported that their agendas were “reactive” and that developing “pro-active” agendas will require greater learning about the issues. Some partners were able to identify new issues thanks to more active policy committees. Several noted that they learned that the agendas should be flexible and allow the organization to quickly take a position on critical issues as they arise.

Activities to build indicator capacity:

- Develop a clearly defined policy agenda:
 - Utilize your policy committee to decide on broad issue items.
 - Survey membership to get their input on issues. This will help you get buy-in and acceptance of the agenda.
 - Do not over schedule your agenda, allow for flexibility in shifting priorities to respond to pressing issues as they arise.
 - Balance reactive items with pro-active activities and goals.
 - Identify both long term and short term goals and objectives.
 - Make sure that the agenda is linked to organizational mission.
- Implement a successful policy agenda:
 - Get buy-in from board of directors as early as possible.
 - Develop messages around your agenda.
 - Develop talking points to help members and partners articulate agenda.
 - Reach out to unlikely partners.

Resources

- *Organizing for Social Change: Manual for Activists*, Kim Bobo, Jackie Kendall, Steve Max, 2001, PP. 22-30. For ordering information go to www.midwestacademy.com.
- The Advocacy Institute <http://www.advocacy.org/planning/>.
- *Nonprofit Agenda: A Blueprint for Action*
<http://www.ncna.org/index.cfm?fuseaction=Page.viewPage&pageID=342#M>.
- Connecticut Association of Nonprofits 2004 Legislative and Public Policy Agenda
<http://www.ctnonprofits.org/Content/Legislature/2004%20Public%20Policy%20Agenda%20Final.doc>.
- South Carolina Association of Nonprofit Organizations Policy Agenda
<http://www.scanpo.org/pdf/Final%20Policy%20Priorities%20Doc..pdf>.
- Michigan Nonprofit Association, *Michigan's Nonprofit Agenda*
<http://www.mnaonline.org/priorities.asp>.

Relationships with Nonprofits, Government Agencies, and Policymakers



Effective practice: To engage effectively in public policy work, organizations need to build relationships with and have the ability to establish partnerships and coalitions with other nonprofits in their state. They also need to have relationships with the targets of their advocacy efforts—government agencies and policymakers—and build credibility with these targets.

Lessons learned: The increased involvement in public policy work attracted new members and allowed the Building Capacity for Public Policy partners to expand the number of nonprofits with whom they have relationships. All reported a measurable increase in the involvement of nonprofits in their public policy activities—from attending training sessions and regional meetings, to providing testimony—and increases in the number of requests for policy assistance. As one partner stated “A major lesson learned is that public policy work is not a solo activity.” Partners made deliberate attempts to engage in coalitions and bring more groups to the table. Another partner commented that a valuable lesson learned was “the value of the testimony of individual nonprofit organizations and the importance of the correct match for each committee.”

All partners report that they have expanded their relationships with policymakers and government officials and made progress in “building their credibility” with these targets. Typically, by engaging in activities such as monitoring and testifying around specific, sector-related policy issues, partners have been able to develop working relationships with key legislative staff in those areas or with nonprofit regulatory agencies like state Offices of the Attorney General. All partners now hold some type of annual public policy day, nonprofit visibility day, and/or legislative receptions, and feature public policy issues at their annual conferences. These activities provide opportunities to forge new relationships with policymakers. Several partners report that legislators and/or their staff now contact them for advice and their positions on pending legislation. One partner has helped build relationships between all nonprofits and government officials through a “State Agency Liaison Program” that provides contacts for nonprofits within state agencies and has resulted in tangible benefits for nonprofits (including better access to grant information and training resources).

Activities to build indicator capacity:

- Build relationships with other nonprofits in your state-realize that you do not have to do it all alone you have potential partners all around you.
- Establish relationships with government agencies and policymakers.
 - Schedule regular meetings with them to offer to be helpful when dealing with your issue.
- Host a day at the state capital for your members. This serves several purposes - it gets your members familiar with the capital, makes it less intimidating, legislators get used to seeing you at the capital and realize that you have access to a large number of their constituents.
- Build credibility with those outside of your issue area by producing credible and reliable information on the sector and your issue. Information is a valuable resource to policymakers and you are the expert on your issues so establish your organization as a resource.
- Invite policymakers to visit your organization to see the people that you help. You can also invite them to your special events to speak or to give them an award or recognition for their help on your issues. These provide photo opportunities for policymakers that show them meeting with members of the community and are good publicity for the organization as well.
- Act as a convener-- this is key especially when you notice a gap bring together diverse groups to work on common issues.
- Build a database of existing coalitions and serve as bridge to bring them together.

Resources:

- *The Nonprofit Lobbying Guide*, Bob Smucker, Independent Sector 1999. PP. 6-15,23-34, 39-42., Available for download at: <http://www.clpi.org/toc.html>.
- *Organizing for Social Change: Manual for Activists*, Kim Bobo, Jackie Kendall, Steve Max, 2001, PP. 100-140. For ordering information go to www.midwestacademy.com.
- *So You Want to Make a Difference*, Nancy Amidel 1991. 14th Edition published in December 2002. OMB Watch, PP. 44-54. Available on-line at <http://www.npaction.org/article/articleview/193/1/194>.
- The Advocacy Institute, Empowering the Coalition <http://www.advocacy.org/coalitions/>.

Organizational Resources to Engage in Public Policy

Effective practice: To effectively engage in public policy work, nonprofits need to have the financial resources dedicated specifically to support their public policy activities. The organization must have at least one full-time staff person or lobbyist whose primary responsibility is public policy.



Lessons learned: Having a dedicated staff person enabled Building Capacity for Public Policy partners to increase the level and frequency of their public policy-related activities. This in turn increased the visibility of the state association, which attracted more resources. Examples of additional resources that partners were able to attract included: interns from colleges and universities, additional grants from local and national foundations, new members and thus new dollars. Several partners reported challenges in maintaining a full time staff person and have found more stability through the hiring of a full or part time lobbyist.

Activities to build indicator capacity:

- Evaluate the resources the organization already has. Is there a staff person who has the skill to work on policy? Is there a board member who is interested? Are you currently partnered with a group whose work you can leverage to build your policy capabilities?
- Allocate some general operating funds to public policy.
- Designate at least one full-time staff person or lobbyist whose primary responsibility is public policy.
- If unable to have a full-time staff person, utilize part of a staff member's time to track and monitor key issues.
- Share a lobbyist with other groups to follow your issues at the state house.
- Recruit a board member who has a strong interest in policy to take the lead on organization's policy work.
- Work in coalition with other organizations that share your interest. It is important to remember that you do not have to do it all. Working in partnership can help to leverage your resources and help you to accomplish more than you would have alone.

Resources:

- NCNA and State Associations of Nonprofits. List available at www.ncna.org.
- Charity Lobbying in the Public Interest, www.clpi.org.
- The Advocacy Institute, Seed the Team, <http://www.advocacy.org/leadership/>.
- *So You Want to Make a Difference*, Nancy Amidel 1991. 14th Edition published in December 2002. OMB Watch, PP. 33-43. Available on-line at <http://www.npaction.org/article/articleview/191/1/194/>.

Communication Skills and Infrastructure



Effective practice: To effectively engage in public policy work, nonprofits need to have staff skilled in communicating with policy makers and media as well as an infrastructure for communicating regularly and in a timely fashion with both members and policymakers.

Lessons from: During the grant period, all Building Capacity for Public Policy partners increased communications products focused on member education, including: adding public policy content to their general membership newsletters, developing specific policy-oriented newsletters distributed by broadcast fax, using e-mail news alerts, creating policy-oriented listservs, including more policy information on their website (and providing more frequent updates to policy information on the website), creating nonprofit guides for policy makers, and preparing special policy reports. Several partners have developed relationships with the media and report that reporters call them regularly for information on nonprofit issues.

Activities to help improve indicator capacity:

- Strengthen skills in communicating with policy makers.
 - Include policy makers on your mailing lists for reports and materials that reinforce that you are the expert on your chosen issue.
- Regular and timely communication with members and policymakers.
 - Send policy updates to members on a regular basis (increase during your legislative session if necessary).
- Post policy information on your website.
- Develop a Listserve to communicate with members.
- Educate members to help keep them on message when mobilizing them on your issues.
- Develop a policy corner in regular communication pieces.
 - Some members created a special policy news letters but the majority included a policy/advocacy section in their newsletters.
- Develop a system for issuing action alerts to member in a timely manner.
 - www.GiveVoice.org, developed as apart of BCAPP, is an example of an electronic advocacy/communication tool.
- Develop relationship with key media contacts and feed stories about upcoming events and pressing issues.
 - When contacting a reporter make sure you tell him or her how your story connects to their work.
 - One way to develop relationship is to regularly share your insights with reporters on stories that they published about your issues. You can also suggest different approaches or viewpoints that could have been included, this reinforces that you are an expert on this issue.
 - Put reporters on your mailing list for annual reports, research reports, and invitations to special events.

- Respond to a reporter's call in a timely manner, typically within a few hours.
- Develop a file with relevant statistics and data about your issue and share this information with your press contacts.
- Become a resource for information.
- Help reporters find experts for their stories by improving your referral skills.
- Help reporters find good graphics and images. Reporters often need charts, lists, and graphics as illustrations for their stories.
- Invite a reporter for lunch at your organization to meet with staff, board members, or clients.
- Create and update a "For the Press" section in your website. This section should list key contacts, highlight your mission, and list press releases.
- Thank reporters when they write a story featuring your organization.
- Send them creative story ideas and be prepared to follow-up on your suggestions if they are accepted.

Resources:

- NCNA Tool Kit: [Media Relations: How to Earn Press Coverage for Your Organization](http://www.ncna.org/index.cfm?fuseaction=Page.viewPage&pageId=368) available at <http://www.ncna.org/index.cfm?fuseaction=Page.viewPage&pageId=368>.
- *The Nonprofit Lobbying Guide*, Bob Smucker, Independent Sector 1999. PP. 16-33, 45-49, Available for download at: <http://www.clpi.org/toc.html>.
- *Organizing for Social Change: Manual for Activists*, Kim Bobo, Jackie Kendall, Steve Max, 2001, PP. 140-172. For ordering information go to www.midwestacademy.com.
- *So You Want to Make a Difference*, Nancy Amidel 1991. 14th Edition published in December 2002. OMB Watch, PP. 44-54. Available on-line at <http://www.npaction.org/article/articleview/193/1/194>.
- The Advocacy Institute, Outreach <http://www.advocacy.org/communicate/>.
- *The Wilder Nonprofit Field Guide to Conducting Community Forums: Engaging Citizens*, Carol Lukas and Linda Hoskins, 2003. Order at www.wilder.org/pubs.

Knowledge of State, Local, and National Politics

Effective practice: To effectively engage in public policy work, state associations need to understand the political climate within which they work and be able to develop strategies that are appropriate to this environment.



Lessons learned: As the Building Capacity for Public Policy partners engaged in more intensive advocacy work—e.g., work on new and more issues, carrying out more activities—they learned more about strategy. Comments about lessons learned included things like: “we realized we need to pursue multiple channels rather than relying on the word of a single legislator.” A number of comments suggested that partners also increased their political savvy: “a key lesson learned was the value of testimony of individual nonprofits and the importance of the correct match for each committee.” Another commented: “we learned that early work on an issue positions the organization to be at the table when the issue is back on the table.”

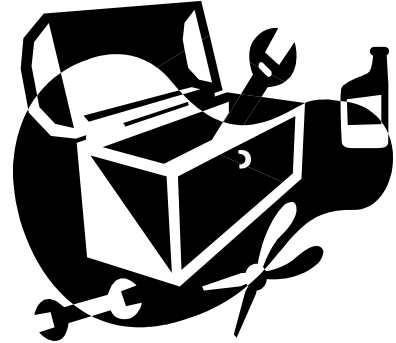
Activities to help improve indicator capacity:

- Understand the political climate in which you work:
 - Are there term limits?
 - How much influence does staff have? Build relationships with policymaker’s staff.
- Understand the culture of your state’s politics.
- Identify and utilize the power and influence of your members—know which of your members have relationships with particular policy makers.
- Develop strategies that are appropriate to this environment, that is trying to push an agenda too far will not lead to success.
- Do your research on policymakers. Know where they all stand on your issue. This will make you a better advocate for your issue.

Resources:

- The National Council of Nonprofit Associations and the State Associations of Nonprofits, www.ncna.org.
- *The Nonprofit Lobbying Guide*, Bob Smucker, Independent Sector 1999. PP. 6-15. Available for download at: <http://www.clpi.org/toc.html>.
- *So You Want to Make a Difference*, Nancy Amidel 1991. 14th Edition published in December 2002. OMB Watch, PP. 14-32. Available on-line at <http://www.npaction.org/article/archive/194/0>.
- National Conference of State Legislators, www.ncsl.org.
- National Governors Associations, www.nga.org.
- State Government websites www.state.stateabbreviation.us (e.g. www.state.nh.us for New Hampshire).
- Thomas <http://thomas.loc.gov/>.

Technical Expertise Related to Public Policy



Effective practice: To effectively engage in public policy work, state associations and others need to have an understanding of the technical areas related to public policy, including the legislative process, tax policy, budget policy and the budget process, and general policy issues concerning the nonprofit sector in their state.

Lessons learned: Reports from the Building Capacity for Public Policy partners suggest that increasing technical expertise related to public policy takes time. Numerous partners reported that they continue to “learn the ropes” of public policy or that they need to “increase (our) sophistication in policy analysis.” One partner reported that limited expertise in an area led them to promote a policy that in fact ended up having a very limited impact on the issue they sought to address.

Activities to help improve indicator capacity:

- Understand how the legislative process works. Are there special requirements on particular types of bills? Are bills pre-filed? This can help you be more effective with your efforts.
- Understand the budget and appropriation process and timeline. This is especially important if much of your money comes from grants and contract with the government.
- Understand the federal and state lobbying rules.
- Use others for information and guidance, such as national players or state/regional groups.
- Set aside one hour per week to visit websites, read newsletters, editorials and newspapers that can deepen your understanding of the key emerging issues.
- Participate in listserv and e-newsletters that can give your current information.
- If you are not sure about an issue, consult with a trusted partner organization. Do not be afraid to say I have to do more research and get back to someone about the issue.

Resources:

- The National Council of Nonprofit Associations and the State Associations of Nonprofits, www.ncna.org.
- Charity Lobbying in the Public Interest, www.clpi.org.
- Alliance for Justice, www.afj.org.
- *The Nonprofit Lobbying Guide*, Bob Smucker, Independent Sector, 1999. PP. 49-77. Available for download at: <http://www.clpi.org/toc.html>.
- *So You Want to Make a Difference*, Nancy Amidel, 1991. 14th Edition published in December 2002. OMB Watch, PP. 14-32. Available on-line at <http://www.npaction.org/article/archive/194/0>.
- National Conference of State Legislators, www.ncsl.org.
- National Governors Associations, www.nga.org.
- State Government websites www.state.stateabbreviation.us (e.g. www.state.nh.us for New Hampshire).

Challenges to Building Capacity for Public Policy

Challenges to launching a public policy program can be daunting, but they can be overcome. Some of the challenges in the Building Capacity for Public Policy project and the manner in which they were resolved are described below:

Lack of Resources:

A common challenge is the lack of resources, both money and people. Some of the BCAPP partners found that funding just the public policy and advocacy work was more difficult than expected. There is a misconception among some foundations that they cannot fund advocacy work or lobbying. Many national groups including NCNA, Charity Lobbying in the Public Interest and the Alliance for Justice have been working to educate foundations that they can fund the advocacy work of nonprofits. What many organizations have done in response to this is to use core support money to fund advocacy activities. Building public policy work as a core element of your organizations can help fund this work as you apply for general operating support grants.

Recruiting and retaining qualified public policy staff was a challenge for some BCAPP partners. It was difficult to find someone with the skills needed at the salaries that they were able to offer. While looking for replacement staff, much of the work would shift to an executive director who could not devote sufficient time to policy work due to competing interests. Organizations found creative solutions to this problem by hiring a contract lobbyist that they shared with other like-minded organizations, splitting the job among others in the office that had the interest in tracking and following legislation or utilizing a board member to work on policy issues.

Participation from Membership:

BCAPP partners also encountered challenges in obtaining consistent participation of members in sponsored policy activities. There were times when they found themselves in competition with other organizations annual conferences and/or events for participation from their membership. In an effort to address this challenge, they learned the importance of finding partner organizations for their events. For example, co-sponsoring events and speaking at partner's conferences,

Realistic Expectations:

A lesson learned from BCAPP is that once capacity is built and engaging in public policy begins, the expectations from members grows exponentially as you provide them with more information to develop the skills. It is important to understand that setting up a program is a process; it is going to take planning and time. Learn to leverage the resources that the organization already has access to including national networks, partner organizations, board members, and volunteers.



Continuing to Develop Skills:

It is important to keep developing your skills and strategies as the organization builds its policy activities, this is closely related to growing expectations. The more you engage in policy activities the better you are expected to be at it. You need to keep up with how new ways of engaging in these activities. For example, how are technology and the Internet changing the way we communicate with policy makers?

Resources:

Foundation funding

- Charity Lobbying in the Public Interest: <http://www.clpi.org/funding.html>.
- Alliance for Justice: <http://www.allianceforjustice.org/foundation/index.html>.

Member participation

- *The Lobbying and Advocacy Handbook for Nonprofit Organizations*, Marcia Avner, Wilder Foundation, 2002, pgs. 21-32. Order at www.wilder.org/pubs.
- *The Nonprofit Lobbying Guide*, Bob Smucker, Charity Lobbying in the Public Interest. 1999, pgs. 79-104. Available for download at: <http://www.clpi.org/toc.html>.

Continuing to develop skills

- Advocacy Institute, www.advocacy.org.
- Charity Lobbying in the Public Interest, www.clpi.org.
- National Council of Nonprofit Associations and the State Associations of Nonprofits, www.ncna.org.

Acknowledgements

NCNA would like to acknowledge the contributions of the following state associations for their participation in the Building Capacity for Public Policy (BCAPP) project and/or evaluation:

BCAPP State Partners:

Center for Non-Profit Corporations (New Jersey)
Council of Community Services of New York State
Louisiana Association of Nonprofit Organizations
Ohio Association of Nonprofit Organizations
South Carolina Association of Nonprofit Organizations
Vermont Alliance for Nonprofit Organizations

Evaluation Interviews:

Colorado Association of Nonprofit Organizations
Florida Association of Nonprofit Organizations
Georgia Center for Nonprofits
Maryland Association of Nonprofit Organizations
Michigan Nonprofit Association
Minnesota Council of Nonprofits
New Hampshire Center for Nonprofits
North Dakota Association of Nonprofit Organizations
North Carolina Center for Nonprofits
Washington Council of Agencies (DC)

Acknowledgment also goes to Independent Sector (IS), our national partner on the BCAPP project.

Special Thanks to Mosaica: The Center of Nonprofit Development and Pluralism (www.mosaica.org), a consultant firm housed in Washington, DC, that conducted the BCAPP evaluation. NCNA and IS express gratitude for the excellent work of this group.