



ADVOCACY FIELD GUIDE

for Lean Funders

How Small and Place-Based Foundations
and Donors Can Make Big Change
With Little Money



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Preparation for Advocacy

Success in the advocacy and policy arena depends on knowing who the decision-makers are, what motivates them, the best arguments and supporting data to use, the most effective voices and champions, and the best timing. These will be specific to every issue and will vary in every town, city or state. Therefore, to apply the principles and practices in this guide, you first need to choose a focus for your policy work — usually one or two issues you care deeply about — and then you need to learn everything you can about that issue.



This, then, is the essential preparation for advocacy — focus and scanning the policy landscape of your chosen issue.

Steps 1 and 2 of this guide explore this critical work — the foundation upon which everything else is built. This work may take several months but will position you for success.

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Exponent Philanthropy is where foundation leaders and individual funders learn from and inspire one another to make exponential impact. Exponent Philanthropy is a member-led association with a mission to amplify and increase the impact of lean funders by building an inclusive community where they can learn, connect, and collaborate.

Andy Carroll works in the Exponent Philanthropy community to empower foundations with few or no staff to leverage their unique position and assets to catalyze change on important issues. He speaks and writes about how small, place-based funders come to make outsized impact by becoming convenors, capacity builders, listeners and coaches, brokers, matchmakers, advocates, and catalysts.

Frontera Strategy is a public affairs firm that provides comprehensive policy and resource development and community outreach services for nonprofits and foundations.

Jason Sabo, Frontera's founder, is a lobbyist, political strategist and coalition builder. Prior to launching Frontera, Jason worked at state capitols around the United States for more than a decade. Jason has developed and implemented complex multiyear advocacy efforts that have resulted in changes to law and policy impacting millions of children and families. His work often involves assisting foundations and other philanthropists to strategically invest their dollars to achieve policy change. Over the years, he has developed the approach featured in this field guide and worked with individual foundations and funder coalitions to apply it in several states.

Lisa Kerber, Ph.D. supports Frontera's advocacy efforts by providing qualitative and quantitative research services. Her portfolio includes literature reviews, needs assessments and environmental scans, program and policy evaluation, statistical analyses, and survey research for associations, foundations, and nonprofit service organizations active in state capitols.



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