

Advocacy and Systems Change

Event Summary

April 2020

Event Background

This event was co-convened by the [JR McKenzie Trust](#), [Philanthropy New Zealand](#) and the [Centre for Social Impact](#) to enable the philanthropic sector to explore advocacy as a tool for driving positive systems change.

This sector conversation was informed by the report '[Voice, Influence, Action](#)', which was commissioned in 2019 by the JR McKenzie Trust and completed by the Centre for Social Impact. The event sought to create a learning space to share the findings from this research and support funders to collectively explore:

- What advocacy entails in its various forms.
- How, where and when advocacy can act as a tool to influence the conditions for systems change.
- The realities experienced by funders, NGOs and communities in trying to resource advocacy work.
- The key opportunities for funders engaging in advocacy.

This summary provides key messages from speakers and participant discussion about the potential for philanthropic engagement with advocacy in Aotearoa New Zealand.

Key Messages from Guest Speakers

Robyn Scott: JR McKenzie Trust's advocacy journey

Robyn Scott (Executive Director) summarised JR McKenzie Trust's advocacy journey – from Sir Roy McKenzie's decision to fund a group of women who were looking to open a refuge at a time when family violence issues were not on the public radar; to explicitly building advocacy into the Trust's 2010 strategy and becoming an intentional investor in advocacy action.

JR McKenzie Trust's vision is 'Creating a socially just and inclusive Aotearoa New Zealand'. This social justice focus has led the Trust towards more deliberate investment in advocacy as a tool to support systems and policy changes in key areas that include drug reform, criminal justice reform, child poverty and the living wage.

Robyn shared that support for advocacy is a principle of practice for the Trust and that advocacy "will be part of our DNA moving forward". She noted, however, that investing in advocacy is challenging work. It requires funders to seek out ngā kaikōkiri (grantee partners) who have a mission that aligns with their own, and who are also skilled, strategic and savvy operators in their field.

Rachael Trotman: Insights from 'Voice, Influence, Action' research

In 2019, Rachael Trotman (Associate, Centre for Social Impact) completed deep-dive research into advocacy on behalf of the JR McKenzie Trust. Through a literature review and interviews with local and international leaders in the field, the research clarifies the nature of advocacy and its potential as a tool for systems change.

Rachael shared some of the key messages from the research:

- Advocacy involves making a case for a cause or mission to those who can do something about it. Many funders avoid or are wary of funding advocacy because of its perceived political nature.
- However, advocacy is a deep and broad field that can involve a range of activities that many funders are already engaged with, including:

- Raising awareness about important issues.
 - Building and sharing an evidence base that highlights the need for change.
 - Raising up the voices of people who are directly impacted by an issue but not typically heard from or listened to.
 - Convening conversations to support connected action towards change.
 - Working on issues at the root cause of systemic inequalities and injustices.
- A good way for funders to get started with advocacy is to map what they already do and how these activities might align with different forms of advocacy. Over time, funders should begin to look at how advocacy efforts might link to six conditions of systems change¹ – i.e. influencing policies, creating more effective practices, addressing inequitable resource flows, building relationships, shifting power dynamics and decision-making to communities that experience exclusion, and changing mental models, behaviours and norms.
 - Good practice advice for funders in terms of advocacy includes:
 - Focus on advocacy opportunities that align to your mission and values.
 - Be informed, understand the context and listen to the communities most affected.
 - Support those communities to lead and ensure community voices and people with lived experience guide decision-making about funding.
 - Find skilled changemakers and advocates – and wrap support around them to build their capacity and capability.
 - Be committed to an issue for the long-term, as entrenched issues take time to shift.
 - Understand – and be transparent about – who gains and loses as a result of funding the issue.
 - Fund with flexibility to move with shifting dynamics and to seize opportunities when the time is right.
 - Be prepared to fail.
 - Remain politically neutral – but leverage your funder reputation/voice and build on your relationships with e.g., government ministers and other key decision-makers.
 - Understand that evaluation of advocacy needs to tell the story, surface learning and be able to adapt to changing circumstances.

Emily Tow: Tow Foundation’s experiences of driving change and reform through advocacy

Emily Tow (President) shared insights from her work with the Tow Foundation – particularly the Foundation’s role in driving through youth justice reform in Connecticut. Their strategic approach and engagement with advocacy contributed to significant changes in youth justice practices, as well as state law reform that saw the age at which youth could be tried in court as adults lifted from 16 to 18 years of age.

Emily shared key messages and advice for funders in thinking about their advocacy roles:

- Advocacy for systems change enables transformative impact from limited resourcing.

¹ These six conditions of system change are outlined in Kania, Kramer and Senge's 2018 article called The Water of Systems Change; see https://www.fsg.org/publications/water_of_systems_change.

- Advocacy for social impact is now core to the Tow Foundation's strategy – but the journey to this place has not been a 'straight line'. It required much experimentation, risk-taking, failure and learning. This learning and adapting on-the-go is a key principle that has ultimately enabled some big wins.
- The Tow Foundation understands advocacy as building public support for a cause or policy change. This requires a range of activities – from building networks and coalitions, to collecting data about the need for change and disseminating that research to decision-makers.



- To engage effectively in advocacy for systems change and reform, it is vital to get to know the specific nature of an issue and the groups leading the response to this issue. Transactional giving does not enable this as effectively as more proactive and relational models of philanthropy.
- It is important to build relationships with allies – but also with people on the 'other' side of an issue as this helps generate better understanding about the potential barriers to change. For Tow Foundation's work on justice reform, this meant not only working with advocates and reformers, but also judges, police chiefs, prosecutors and prison wardens. Bringing both sides together can help strengthen the case for change and also surface shared goals.
- Emily's advice to funders thinking about advocacy included:
 - Start small, stay curious, learn without bias and build trust.
 - Work hard to understand the depth of an issue – and particularly the experiences of those directly impacted by the issue.
 - Convene key people to understand all sides of the problem and find the common goals and focus on the tangible opportunities for change.
 - Build networks and coalitions and/or support them to connect and organise.
 - Invest in leadership and training so that those with lived experience can be the next generation of leaders.
 - Use the freedom, credibility and authority that funders hold as a platform to convene, broker and influence.
 - Share and promote the work of people and organisations who understand the issue and are working on solutions.
 - Think about doubling down on the investment when there is momentum and when things are working.

NGO Panel: The opportunities and challenges of resourcing advocacy

A panel of NGO leaders was convened to share their experiences of leading advocacy efforts at the coal face in New Zealand's communities – including the challenges that they experience in trying to resource this work and their thoughts on what philanthropic funders can do to support them to drive systems change.

Speakers Tim Maurice ([Asylum Seekers Support Trust](#)), Tania Sawicki Mead ([JustSpeak](#)) and Justine McFarlane ([Lifewise](#)) offered key messages to funders:

- Almost all NGOs are engaged in some form of advocacy. Whilst most NGOs realise that advocacy in pursuit of systems change offers potential to have a deeper and more sustainable impact, few

organisations have dedicated resources to deliver the type of sustained and strategic advocacy activities that are required to deliver systems change.

- The reality is that many NGOs are operating in a position where they must make difficult choices and balance day-to-day advocacy efforts (i.e. advocating for the needs and rights of families and communities in their care) with more strategic advocacy goals. NGO leaders in particular can find it difficult to carve out the time needed to move their focus upstream and work on affecting systems change.
- Systems are complex and sticky and it is challenging to understand this complexity from one perspective. This means advocacy efforts must engage people from inside, outside and alongside the system – and funders can help to achieve this. Above all, it is critical that the voices of people with lived experience inside the system direct and drive the efforts for change; supported by allies that help to build pressure and momentum.
- Where NGOs are able to focus efforts on advocacy for systems change, there are other key challenges that they experience, including:
 - Sustaining momentum long-term when working on complex and interconnected issues.
 - Attracting enough funding due to perceptions of risk; as well as sustaining funder interest in battles that will be long, with failures along the way.
 - Generating sufficient reach and influence to change public and policymaker attitudes.
- Funders can support NGOs with their strategic advocacy efforts in these ways:
 - Build relationships and get to know the complexity of the work required.
 - Ask NGOs what kind of resourcing they need.
 - Resource operational costs, provide unrestricted funding and offer targeted funding for advocacy, so that NGOs can develop dedicated, flexible resources to support their strategic advocacy efforts without compromising other critical elements of their work e.g., frontline services.
 - Be open about the limitations of what funders can and can't fund and where their interests overlap with the NGO's interests.
 - Prioritise organisations that genuinely support the voices of people with lived experience – which may mean looking outside of the funder's traditional grantee networks.
 - Be prepared to hear truths about the funder's own power structures – and be prepared to respond to this by working on ways to share decision-making power or co-design funding approaches with communities.
 - Help NGOs to make connections with people at the right level and with the right decision-making authority to make changes at a systems level.
 - Invest in key skills such as media training, and develop the capacity of NGOs to be transformative advocates.
 - Provide long-term support so that an NGO's advocacy resources can stay mobilised and efforts can be consistent and persistent.
 - Support and resource NGO advocates to connect and learn from one another, or even to form coalitions for change.
 - Help to disseminate evidence for change brought forward by NGOs.
 - Support NGOs to understand and evaluate the impact of their advocacy efforts.
 - Be open to failure but stick with it.

Discussion: Advancing philanthropic sector engagement with advocacy in NZ

What excites us about the potential of advocacy?

Event participants were encouraged to discuss the potential of advocacy as a tool that funders can engage with. Overall, people in the room were excited about:

- The opportunity for advocacy to leverage different impact and drive systems change.
- The role of advocacy in giving voice to the voiceless and the opportunities to listen and learn from people with lived experiences.
- The organisations doing the work and the natural ability of emerging young leaders to act as agitators in the system.
- The potential for funders to be more engaged with advocacy, to work together on shared issues that they care about, and to harness the collective power and influence of the philanthropic sector for systems change.
- Learning and sharing what funders are already doing in the advocacy space (without realising), e.g., investing in and sharing evidence.

What makes us nervous about engaging in advocacy?

Event participants were encouraged to talk about their fears and perceived risks of engaging in advocacy. Overall, people discussed being nervous about:

- Advocacy that feels ‘too political’; in response to which, others suggested:
 - Focusing on evidence-based problems that cut across political lines.
 - Framing opportunities in relation to their potential for systems change.
 - Partnering with private foundations and sharing roles based on risk appetite.
- The need for flexible, dynamic funding with long-term commitments – and how easy it will be for trustees to adapt away from traditional funding processes to achieve this.
- Having to reduce funding to meet urgent needs in order to free up resources to work on systems change.
- How funders might understand impact along the way, when the journey is likely to be long.

What are some potential next steps for the philanthropic sector?

Event participants were encouraged to consider any next steps that might help their organisations – and the philanthropic sector as a whole – to understand the potential of advocacy and take steps in engaging with advocacy as part of their funding toolkit. Potential next steps included:

- Mapping current priorities and funding models to understand the past, current and potential roles of advocacy within each funders’ respective practices.

- Considering how funding can be used to resource strategic advocacy for systems change and help build the capacity and capability of advocates.
- Upskilling philanthropic trustees to understand key concepts and sharing examples with them to demonstrate what advocacy for systems change can look like in practice.
- Using philanthropic sector networks and connections for influence in ways that support advocacy efforts on key issues.
- Exploring the potential for a 'funders of advocacy' network – with future scope to co-fund advocacy efforts around areas of shared interest to those in the network.
- Continue to work collectively on our own philanthropic 'system' to identify inequities and on opportunities to shift power and resources.