

# Hearts, Minds, Power.

A practical handbook for philanthropic  
investment in campaigning & advocacy

**Nick Moraitis**

# CONTENTS

<b>Introduction</b> . . . . .	<b>1</b>
 <b>Why invest in advocacy?</b> . . . . .	<b>3</b>
 <b>Setting your philanthropic strategy</b> . . . . .	<b>9</b>
– Defining your Priorities	10
› Personal factors	11
› Strategic factors	11
› Intersectional issue identification	13
› Working with others	14
– Resourcing strategy and convening	15
 <b>What makes an advocacy effort win?</b> . . . . .	<b>17</b>
– Pragmatism, flexibility and ability to leverage moments	19
– Solid strategy and theory of change	20
– Effective messaging	22
– Movement approach	24
– Great leadership	25
 <b>Understanding advocacy tactics.</b> . . . . .	<b>27</b>
– Common features of a good tactic	28
– Common tactical areas	29
 <b>Advocacy portfolio design</b> . . . . .	<b>37</b>
– Investing in core, campaigns and/or individuals	38
– Understanding the role of different organisations	42
– Legal structure and other considerations	53
– Scale of investment	55
 <b>Organising yourself</b> . . . . .	<b>57</b>
– Strengthening your expertise	58
– The deal flow	59
– The process of grantmaking	61
– The relationship with the grantee	65
 <b>Appendix: What does it all cost?</b> . . . . .	<b>66</b>

# HEARTS, MINDS, POWER.

## **This version of the handbook was updated in April 2024.**

In its first edition (2020), this project sincerely benefited from the advice and support of Sarah Wickham, then at Philanthropy Australia, Joe Skrzynski AO and the Skrzynski Family Sky Foundation, Professor Marc Stears and Lisa Fennis at the University of Sydney's Policy Lab, and Kirsty Albion, my successor as Executive Director at Australian Progress. Elise Dalley and Michael Poland's energy, extrapolation, editing and project management got it done, thank you.

Thanks to Made Visual on the design!

## **Thank you to those philanthropists and social change advocates who shared insights during interviews in 2019.**

\*All affiliations relate to organisations they worked with at the time of interview.

### **Advocacy experts**



Hugh de Kretser, *Human Rights Law Centre*

Simon Goff, *Purpose*

Tony Mohr, *Alliance for Gambling Reform*

Claire O'Rourke, *Amnesty International*

Melanie Poole, *Federation of Community Legal Centres*

Marc Stears, *University of Sydney Policy Lab*

Daniel Stone, *PrincipleCo*

Anita Tang, *Independent advisor and advocacy coach*

### **Philanthropy**



Ferdi Hepworth, *Equity Trustees*

Sue McKinnon, *McKinnon Family Foundation*

Sarah Wickham, *Philanthropy Australia*

Matt Singmin and Genelle Nicholls, *Vasudhara Foundation*

Paul Steele and Col Duthie, *donkey wheel trust*

Adam Milgrom, *Tripple*

## ABOUT THE AUTHOR

Nick Moraitis is the Principal of Key Moment, a consultancy bridging the worlds of philanthropy and civil society in Australia.

Nick has worked in social change for more than 20 years, including as CEO of the Foundation for Young Australians, founder and Executive Director of Australian Progress, and Director of consultancy Make Believe. Nick has also held strategic positions at other NGOs such as Amnesty International, GetUp and Greenpeace. Nick has served on more than a dozen boards and advisory committees, including the Australian National Commission for UNESCO, the ABC Advisory Council, and the Centre for Policy Development.

## ABOUT AUSTRALIAN PROGRESS

**Australian Progress builds the capacity of social change organisations and movements to advocate and win.**

Our theory of change is based on a deep belief in and commitment to collective power. We believe that transformational change comes from capable, connected and innovative organisations and movements that centre lived expertise to advocate and win systemic change. To realise our theory of change, we draw on global thought-leaders and best practice to:

**Transform the skills of advocates** - equipping them with cutting-edge leadership and advocacy skills.

**Foster community and connections** - building relationships, sharing knowledge and inspiring courage in those we bring together.

**Drive shared action** - leveraging our unique sector positioning to incubate new initiatives, fill knowledge gaps through strategic research, and centralise critical cross-sector infrastructure.



# INTRODUCTION

There is no bigger trend in Australian philanthropy than advocacy, and with good reason. Philanthropists and foundations can have a greater impact on the challenges facing our world through the shift from ‘charity’ to ‘systems change’.

**This handbook is the friend of the philanthropic funder – a practical handbook to help translate a casual interest in investing in advocacy into a successful practice.**

There is growing appreciation that the issues facing us, from health to climate change to inequality, are complex, require significant investment, and mean dealing with power structures and vested interests. Simply ameliorating harms won’t cut it.

Philanthropy in Australia is also a small community. We’re seeing others engage and have success with advocacy, and sense we should get involved too – it’s exciting, a representation of our values, and a way to truly leave a legacy.

However, many Australian philanthropists are unsure how to *best* engage or even start. Some of us have backgrounds in business and are less sure operating in a social justice or ‘political’ type of environment. We may have the wrong set of tools, networks, or assumptions (such as assuming what works in product marketing translates into marketing a cause). And we may, quite legitimately, come to philanthropy to exercise a different muscle than we do in our day jobs – more heart than brain.

The result has been an ecosystem of philanthropic funding in which projects are often too small to succeed, the philanthropic sector remains ‘apart’ from cause leaders (not truly benefiting from their expertise), and there is just too little sharing of what works.

Our goal is to demystify advocacy investment, enabling you to support vital initiatives with confidence.

We start by making the case for systems change work to help you bring along other stakeholders.

Then, we look at what constitutes ‘good practice’ in advocacy itself – and discuss funding considerations related to specific tactics and types of grantee organisations. Finally, we turn to issues related to your own philanthropic strategy such as identification, selection, structure, evaluation and risk mitigation.

Along the way, we explore key strategic questions that would be familiar to anyone in the business world. For example:

- Should philanthropic investors be hands-off, or hands-on?
- Should you spread your bets or go all-in on a single investment?
- How patient should you be with your capital?
- How tolerant are you of risk – both financial and reputational?
- What are the opportunities to pool funds with other investors to make bigger investments?
- Is it better to invest in early startups, or in ‘blue chip’ organisations with an extended track record?

In most cases, the answer is ‘it depends’ – but by talking through possible answers to these questions, my goal is to bring some of the rigor associated with for-profit investing into the philanthropic/advocacy space.

At the same time, I want to illuminate how social change is *not* the same as business, and how advocacy differs from service design and delivery. Interviewees for this handbook consistently described advocacy as ‘harder’ and progress less linear because you’re not operating within a defined system but a changing one (where you’re driving the change!), and because setbacks are a constant part of the journey.

There remains an odd chasm, especially in Australia, between active communities of practice in philanthropy (high-net worth individuals and ‘philanthrocrats’) on the one hand, and social change (advocates, community leaders and activists) on the other. So I’ve deliberately set out to draw deeply upon both wells of wisdom and perspectives, to form a bridge between the communities. Generally, I’ve lent more heavily on social changemakers’ views of what makes for effective advocacy, and philanthropists for effective philanthropy. However, it’s fair to say some of the most compelling insights I heard were from one group about the others’ practice.

I hope this project not only inspires greater giving, but also a greater discussion amongst the philanthropy community about what makes for success.



*Nick Moraitis*

**Nick Moraitis**

# Why invest in advocacy?

This handbook mostly focuses on the ‘how’ of good philanthropic investment in advocacy. But before we explore this, it’s worth looking a little further at the ‘why’. There are many reasons why individuals and foundation trustees decide to invest.

The *motivation* behind a gift can impact on the best strategies to adopt, how you decide to support, and how you’ll eventually look back at your gift – so it’s worth going into any philanthropy self-reflective about what drives *your* giving.

Quite often your first task is to convince others (family or board members) to get involved, so you’ll also want to carefully consider which of these arguments will be most persuasive for them.



## Heart first

Many philanthropists get into advocacy through an issue they care deeply about, perhaps through personal experience. While advocacy is often perceived to be more cerebral and less ‘emotional’ than other forms of charitable giving, many of Australia’s biggest advocacy donors *have* been motivated by personal circumstances. For example, investors in marriage equality were members of the LGBTIQ+ community or had family members who were; climate change donors have experience of their rural properties suffering through drought or through a life-changing experience of nature; and many of Australia’s biggest refugee funders draw motivation from their faith.

### Tips to motivate heart-driven donors

- Ask prospective donors (or yourself) to articulate their connection and interest in an issue to others in their own words.
- Visit ‘points of destruction’ – the place where harm is happening to see it first hand.
- Foster 1:1 interaction for a more intimate connection.
- Make space to hear directly from changemakers, rather than just receive their ‘strategic proposals’.
- Start by investing in storytelling work to unearth motivating stories.

### Cautions for heart-driven donors

- Getting too emotionally invested and taking over the campaign.
- Assuming your personal experience is everyone’s experience.
- Confusing advocacy for an individual with systemic advocacy designed to change the root causes.
- Forgetting to be an ally when a personal motivation or interest is addressed, but the problem remains for others.



## Change at the roots creates a snowball

Some philanthropists invest in systems change work because of the lasting change and ripple effects involved. On a basic level, it just makes sense that we should put money into solving problems, rather than merely improving them (like using a band-aid to treat a serious wound).

It's not just the right thing to do, it's also financially efficient – solving a problem means philanthropic funds can be redeployed elsewhere.

Until recently, the grandiose idea of solving problems by shifting entire systems has been the domain of U.S. and other international charities, because few Australian philanthropies had the scale of funds they felt could make a large enough difference. But with more sophisticated collaborations underway, growth in 'pooled funds' where donors create a collective pot, and the emergence of huge multi-billion dollar organisations such as Paul Ramsay and Minderoo Foundations mean philanthropy (and their grantees) are more confident that they have the resources to commit to working at the roots.

Systemic advocacy can be a lever that creates a virtuous cycle for increased 'individual-type' assistance. Hugh de Kretser, former Executive Director at the Human Rights Law Centre (HRLC), made the distinction between their work on individual cases of human rights abuse (e.g. representing individual asylum seekers facing deportation) and more systemic advocacy (e.g. challenging the overall system of offshore immigration detention in the courts). Legal or legislative wins then allow the HRLC to pursue a wider range of legal support for individual asylum seekers – and get more of them to care and safety.

### Criteria to assess whether creating change at the roots

- **Preventative** – aiming to prevent changes from happening before they happen – rather than having to clean it up afterwards.
- **Systemic** – not just changing a very small part of the problem, but aiming for impact across the sector or most of it (ripple effects).
- **Lasting** – will have impact after the project wraps up.
- **Provides a building block** – it should also be a brick in the wall that another brick can be placed on top of. You want to provide a foundation and pathways that connect, rather than dead ends.

*Framework shared by Tony Mohr*

## Philanthropy generally can't do it all – advocacy is how we achieve leverage and scale

One argument goes that, especially in a developed social democracy, donating to local services, hospitals, or emergency services, is letting the Government off-the-hook and forcing charities to 'pick up the slack'. Certainly, the resources available from philanthropy – \$13b total philanthropic giving in Australia (most of it by small donors) are a drop in the ocean compared with the >\$500b available to the Government.

One of the best understood advocacy roles for philanthropy is to fund efforts to convince local, state or federal governments to fund promising or innovative services at a much wider and more systemic scale. For example, in 2011, Australian of the Year Patrick McGorry worked closely with GetUp and others on a multi-faceted advocacy campaign that saw the Federal Government provide nearly half a billion dollars of funding to support an expansion in the number of locations of headspace youth mental health service.

By redirecting your annual donation budget from service provision to advocacy for a year or two – and convincing the government to fund and scale your passions instead, could you free up your funds for other worthy causes?

## Even the playing field

Everyone wanting to bring about change will come up against a status quo – a web of influential and connected institutions and players who have amassed resources and power from the way things are (notably, the laws) and who fight to keep things that way. They might invest extensively in the best connected lobbyists (of course lobbying for changes that *benefit* their business is considered standard commercial practice) and even donate directly to the major political parties.

A coal baron might spend \$100m on an election effort, safe in the knowledge that he stands to gain much more from a favourable Government approving his next big mine. He can clearly see his own vested interest. On the other hand, the value that accrues from the mine and its carbon emissions not going ahead (otherwise known as 'the public interest') is much harder to quantify – a tragedy of the commons.

The daunting reality is that the status quo has more resources, is considered legitimate, and has a high degree of motivation to keep things the way they are. For systems-change work to stand a chance and go head-to-head, often requires farsighted philanthropy – the definition of which is 'for the love of humankind'.

## Big change has always been funded, even if it doesn't seem that way

Margaret Mead famously said, “Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has”. But we need to be honest: they've typically succeeded when they had strong financial backing from philanthropy.

Campaigns involve vast coordination, full-time leaders, vast supplies, a paid media profile and more. The Suffragette Movement in the US is a case in point: we often hear about ordinary women volunteering, but, before winning, huge donations powered their movement, including a single bequest worth \$25m in today's money.

Likewise, contemporary campaigns in Australia are always multi-million dollar efforts, even if this level of expenditure is not always apparent to the public. Often campaigners who want to appear grassroots, or politicians who want to take credit, intentionally obscure the role of money.

Even after the extraordinary marriage equality effort, where \$10m+ was raised and spent by philanthropy for an intensive national organising and advertising effort, the story of the campaigners, *let alone the philanthropic leaders*, was effectively written out of the story by politicians and the media.

The moral of the story? Don't expect glory. And we get the world we are willing to pay for.

## Social change is not linear

It's also becoming clearer that we need to do more to preserve the gains of past social changemakers. From democracy and the rule of law, to our social safety-net and environmental protections, institutions we have taken for granted are being eroded. Globally we are seeing a rise in far-right organisations, austerity-driven cuts in government services, and isolationism impacting on the scale of foreign aid budgets. Sometimes when change happens, such as Brexit in the UK, it can happen swiftly and have very far-reaching consequences across a raft of policy areas and cultural cohesion.

For this reason, philanthropy needs to invest not just in proactive campaigns, but also defensive ones, constantly reinforcing the value of our collective achievements, and pushing back against efforts to chip away at policy gains or institutions – we need to stand up for our values, not take them as granted.

*“Advocacy is not linear, as campaigns evolve, unusual allies can emerge and opportunities can be grasped. You won't always know the answer and what's going to happen.”*

– SOCIAL CHANGE PERSPECTIVE



## If not us, who?

One thing is clear, we can't simply trust that politicians have 'got it covered' when it comes to big social and environmental change. Even on issues, like climate, where there is a powerful desire for change demonstrated in the polls, politicians fail to act. In part it's because they are captured by vested interests, who visit them constantly in Canberra and offer the prospect of a lucrative career post-Parliament. But, even if they ignored vested interests' direct entreaties, politicians (especially when outside Government) are actually surprisingly poorly resourced: they usually lack the agility and resources like research, staffing, outreach, networks, and vast advertising budgets to go head-to-head with lobby groups. And in an era where trust in politicians is at a record low, they are also particularly poor 'messengers' for a cause: when people hear a politician speak, they just switch off.

So much of the time, advocacy and movement building is vital not just to persuade the politicians to do the right thing, but also to provide the political 'cover' necessary when they do.

### The biggest risk is not investing in advocacy

Partly because advocacy funding remains so often 'under the hood', philanthropists in Australia have, essentially, very minimal exposure to risk – whether it be legal, reputational or otherwise.

- Philanthropists' involvement is a step or two removed, often even anonymous;
- The amounts of money involved (even large grants) are often combined with support from others (generating safety in numbers); and in any big debate there are often so many other players (grantees, other NGOs, politicians), that philanthropists may need to proactively jockey for the spotlight if desired.

This is not to say you should not expect winning advocacy campaigns to be free from controversy – indeed, you'll often hope those opposing your view kick up a fuss. But philanthropists, more so than anyone, are generally very well insulated.

## Once you start, you can't stop

A decision to invest in advocacy can initially seem daunting – but once you start I bet you'll be hooked.

It is *incredibly satisfying* to be engaging thoughtfully and boldly on the big issues of our time.

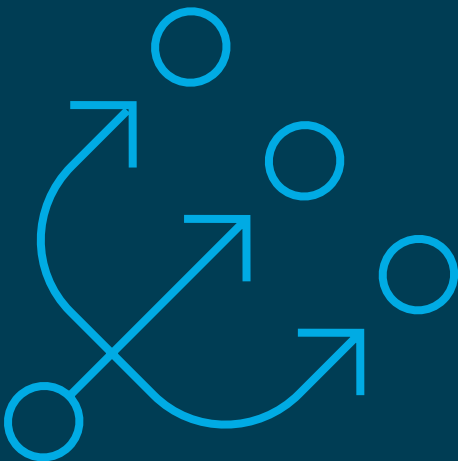
And one of the best by-products is the chance to get to know, support and work with a community of tremendous values-driven changemakers who are strategically and courageously fighting for a better world.

# Setting your philanthropic strategy

Simply glance at the nightly news, or your social media newsfeed and you may feel overwhelmed – there are just so many good causes out there, so many possible campaigns to get behind.

**Where do you start?**

We designed this chapter to help you think strategically about the focus of your giving. We'll help you think about picking your issue focus, equip you with tools to identify which campaign approaches are more promising than others, and address key issues like how much money to give, and over what time.



# DEFINING YOUR PRIORITIES

**How do you go about picking which themes or issues to prioritise when selecting which advocacy or campaign efforts to support?**

At a top level, both donors and activists often pick theme areas based on a personal connection or experience of an issue. Both donors and activists usually decide these things almost intuitively, based on their values and passion areas – deciding for example to invest in climate change work, or refugee rights, or homelessness.



## Personal factors

- **Passion:** a particular ongoing passion for an issue area, perhaps driven by a personal connection to, or experience of, the issue that has created a burning sense of injustice, such as your identity (religion, gender) or an event (whether external such as bushfires or personal, such as a family medical crisis).
- **Expertise:** the issue is one you have personal expertise, qualifications or experience in, for example – a teacher investing in education advocacy, a social worker in people seeking asylum issues, or a banker in economic policy.
- **Relationships:** whether with people who are deeply affected by the issue and whose experience motivates you; or with people who are particularly useful allies – e.g. if most of your connections are in the renewable energy industry, it might make sense to work on climate change.
- **Personal influence:** you can bring your own personal influence to the table in progressing change on the issue – e.g. being a role model or first mover in your industry, requiring suppliers to change their practices.
- **Personal Timing:** it relates to an issue that is current for the family.

## Strategic factors

- **Top of the political agenda:** where the issue could be decided very soon (e.g. there is legislation before Parliament, or a very active public debate) and a donation can help tip a good outcome, prevent a bad one, or prevent it falling off the agenda for unknown more years.
- **Pointy end of current policies:** where the particular issue represents a serious failure that harms people (or opportunity for groundbreaking progress), but also illustrates or enables the broader systemic issues at stake.
- **Root causes:** does it go beyond tackling symptoms to explore and shift deeper, root causes, such as racism, economic systems, belief in, or integrity of, our democratic systems.
- **Long-term threats:** a focus on important, long-term, underfunded issues such as social or environmental impacts of future trends (some donors with this focus prioritise advocacy on digital rights, artificial intelligence, nuclear weapons, health pandemics and climate change).
- **Utilitarian approach:** inspired by theorists such as Peter Singer, what can help the most people right now? *(Some funders in this space prioritise donating to reducing poverty globally or addressing widespread diseases in the developing world such as TB and malaria).*

In prioritising issues to tackle, other helpful rubrics are:

- Is it keenly felt? Is it very harmful to people, or acutely destructive to the environment?
- Is it widely felt? Does it affect many people?
- Is it 'winnable'?
- Will working on this issue alter the relations of power and make it easier to win further changes down the track?

*“[Our funder is effective] because they have a clear understanding that they are about systems change, and their role is as a seed funder or angel investor, who is prepared to take the earliest investments before anyone else. They understand their purpose. They’re not a forever funder – they say, ‘We will be there now and will support you to find other funders’.”*



– SOCIAL CHANGE PERSPECTIVE



## Intersectional issue identification

There is an increasing sense that environmental and social challenges are deeply connected, and it is the intersection points (where, say, climate change, economic disadvantage, racial justice, and women's rights come together) that issues are both most acute and there are the most fertile opportunities for change.

Rather than widening your scope, adding lenses can help you narrow it – for example, looking for areas where climate change is exacerbating economic disadvantage can be a way to shift from a 'theme' to a realistically campaignable issue.

*“One of the things I’m finding right now is how much trusts and foundations have their priority areas of funding (programmatic); I think the desire at that level is very biased towards service delivery – tangible, band-aid solutions they can attribute back to themselves. Fundamentally we need a preventive approach [that is] systemic, lasting.”*



## Working with others

Understanding your role, what's needed, who's important and where your investment can make a difference, is an important and big piece of work in and of itself.

On many issues, climate change being a classic example, there is a *vast* ecosystem of organisations and changemakers who have built up a wealth of knowledge of what works through practice over decades. You'll want to start by learning about, connecting with, and listening to this community. At the end of the day, social change work is delivered through the vision, energy and risk taking of social change campaigners who do the work and put their own reputation on the line.

Making assumptions can be costly. Unfortunately, some donors newly engaged in an issue area make the mistake of assuming that because progress on the issue appears slow, there must be very few people working on it. Or that existing players are ineffective and not worth investing in (rather than they've had *insufficient* investment). Or that changemakers must simply have missed obvious strategies or messages (rather than trying and quietly failing, or discounting strategies only after extensive research). These assumptions often lead to donors funding *their own* advocacy strategies – initiatives that duplicate effort, are not well grounded in a community, and often fail to gain and sustain traction.

### Things to consider if you're developing your own initiative:

- Stop! Re-read the above and check your assumptions.
- Prepare to spend more money: serious staff and commercial suppliers may be less willing to give time and materials at nonprofit rates to a wealthy foundation or individual.
- You'll be popular with nonprofits and collaborators. They'll take calls and rarely critique your approach (at least to your face); and at the same time you'll be pitched all sorts of fairly random ideas that you may need help sifting through.

# RESOURCING STRATEGY AND CONVENING

While dictating strategy or funding your own ideas is to be avoided, one of the highest value contributions *can* be to fund landscape analysis and movement-wide strategy processes that help diverse organisations in a sector map out who does what, identify their own gaps and weaknesses, and plot out opportunities for collaboration. A nice by-product is that you'll also gain this insight to inform future giving.

The reality is that charities and issue sectors are severely under-resourced when it comes to doing core strategy work and thinking about how they work together – they're resource starved, struggling to manage the day-to-day, and rarely have the time and capacity to plan strategically beyond the end of the financial year. As we will see in the next chapter, solid strategy and mapping roles in a *movement* is *key to success in advocacy*, but too often donors just expect organisations to come to them with the strategy work complete, ready to be funded. It's like home building where the owner is happy to 'pay for the tradespeople, but expects the architect and construction manager to volunteer'.

Marc Stears (now at UCL Policy Lab) shared a good practice story from his UK experience – an advocacy campaign designed to shift the Mayor of London's approach to integration of new immigrants and refugees. At the outset, the issue had many fractured voices and groups competing for funds and duplicating effort. Philanthropy played a key convening role, funding a backbone coordinator, holding meetings of all key players at least quarterly, initially focused on building relationships, exchanging and unpacking ideas, and sharing knowledge around initiatives.

*"I think there is a really big need to figure out how to coordinate or alliance build between outside and inside track theories of change. [Too often] they just eat each other. We need [communications channels] between mainstream groups and more radical groups where we can say, 'We are not the same, we are very different, we are not in the same alliance, but. If you're thinking of doing something, next month is the time to do it..' – it's about respectful coordination."*



– SOCIAL CHANGE PERSPECTIVE

### Tips for investing in strategy / alignment processes:

- ✓ Combine a commitment to fund strategy processes, with a clear intention to both fund and mobilise others' funding around the results.
- ✓ Consider whether it is necessary to fund the participation of those involved – especially if there is a significant time burden involved (over a few hours or days). This will also ensure grassroots activists can take part and cover costs of travel, and the opportunity cost of not getting on with their work.
- ✓ Having participants with diverse roles in a movement are important, but they should have broadly common purposes. Strategy processes are not mediation exercises for those with *opposite* interests.
- ✓ You must go to extra effort to ensure participants honestly critique, shape and own the processes you suggest. As a funder, you will have magnetic convening power, but people are likely to make judgments about taking part that are not based solely on their sense of the actual value of what you're proposing.
- ✓ Independent facilitation is important to ensure everyone feels heard, and will enable you to contribute from your perspective. At the same time, consider carefully when and how you take part in the process.
- ✓ Peak-bodies may or may not be the right vehicle to house a movement-wide strategy process. They're more likely to be right if they have recently undergone a leadership change (and therefore be open to new directions), and if they have a proven track record engaging with grassroots players (rather than just longstanding, established members).

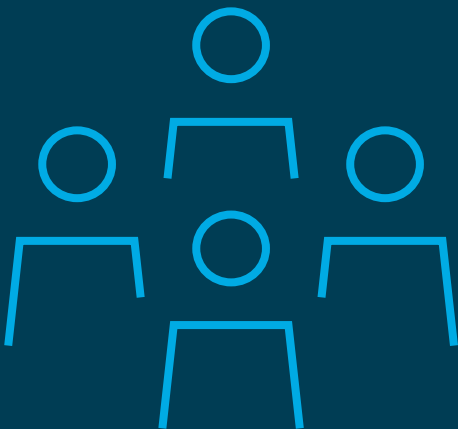
*“In an area where there are fractured voices and lots of people competing, we funded sector wide movement analysis, not just one organisation to do that scoping.”*

– PHILANTHROPY PERSPECTIVE



# What makes an advocacy effort win?

Many people say they're planning an advocacy campaign, but only some have the ingredients that will set themselves up for success. Advocates and philanthropists interviewed repeatedly mentioned **four** key factors they saw present in winning campaigns and social movement efforts.



### The path to success is lined with failure

Success is not 100% synonymous with winning a policy change. In fact, the vast bulk of advocacy efforts fail to achieve their stated policy objectives. Many more 'lose' than 'win', at least within a defined time horizon. Knowing these odds, effective advocates:

- ✓ Develop patience and strong resilience to setbacks;
- ✓ Seek to use the process of a campaign to build rather than spend-down their resources, political capital and power; and
- ✓ Sequence events so that a setback can instead set-up or springboard into a win.

*“Funders need to measure intermediate preconditions to success. For example, with a legal action, if you measure success by whether we win or lose the case, and we lose, it’s not great – but the case may be a chance to put information on record, and we run [the rest of the campaign] because of the case.”*

– SOCIAL CHANGE PERSPECTIVE



# PRAGMATISM, FLEXIBILITY AND ABILITY TO LEVERAGE MOMENTS

Successful advocacy efforts are not just flexible but have the *expectation* they will significantly adapt as circumstances change.

Whether it is an external event (e.g. a news event) or an internal development (e.g. a sudden influx of new supporters), the context in which your advocacy happens is always shifting – indeed, your goal should be to change the environment in your favour, so strategic possibilities unavailable at one point start to open up.

Harvard social movement theorist Marshall Ganz points out that the ability to take advantage of such changes – *moments* – is what separates winning from losing campaigns. For funders, it should be a red flag if a long-term campaign plan or budget looks rigid – it's just not possible to predict exactly what should be done or spent, when.

Instead, look for evidence that potential grantees will shift gears, refocus organisational resources, and make quick-witted decisions at times of inflection on your issue.

Ganz identifies three characteristics of strategic capacity that may help:

- **High motivation** – closeness to the issue drives passion, which drives persistence and hard work, willingness to take risks, and commitment to do the work required to gain the skills needed.
- **Salient knowledge** – mastery of particular skills needed to deliver tactics, and a strong understanding of the 'battleground' (such as the policy options, and the various players, their positions and relationships).
- **Learning processes** – embedded processes around learning, experimentation and adaptation; a diversity of experiences, skills, and backgrounds that ensure different perspectives are at the table; and mindfulness that multiple solutions are possible.

A constant theme of the expert interviews for this handbook was the belief that effective campaigners were *highly pragmatic* and willing to do what it takes rather than 'what they've always done'. Rather than being a 'one-trick pony with tactics' – whether it be online petitions, stunts with furry animal costumes, hanging banners from great heights, or the release of authoritative reports, effective advocacy organisations had a willingness to try new things, or strategically work alongside those who would. Will working on this issue alter the relations of power and make it easier to win further changes down the track?



*“We [try and] find a group that knows how to get change and has proven [runs on the board] and brutal honesty with themselves, and a willingness to examine what’s been done and to unpack that completely and see whether it’s truly achieved lasting change.”*

– PHILANTHROPY PERSPECTIVE

# SOLID STRATEGY AND THEORY OF CHANGE

Campaigns that win are built upon a solid strategic foundation. Having a solid strategy provides a decision-making framework and ‘North Star’ which makes it easier to change tactics quickly.

## Theory of change

Advocates and nonprofits will often talk about their Theory of Change. Whether it’s presented as a simple sentence, or a complex diagram, a Theory of Change is a statement of how the organisation thinks they will ‘change the system’ – how they will get from the current undesirable situation to the new more desirable one.

An imperfect analogy for a Theory of Change is probably a journey plan. You’ll need to consider:

- A destination (*the vision*),
- The route you’ll take, including places you’ll go through on the way (*goals or milestones*)
- Whether you’ll walk, drive or fly (*the approach or tactics*),
- How long it will take (*the timing*)
- Assumptions you’re making (*e.g. the weather and road conditions, the amount of traffic*)
- The values you’ll be expressing in your approach (*e.g. environmental sustainability*)

Organisations and philanthropists should be able to articulate a clear and plausible theory of change, grounded in a clear commitment to a different world.

*“When it comes to setting system changes goals – they should be 75% outside of your control, big, risky... if it’s less than that you’re being too conservative, you need to be held accountable delivering tactics that have the promise to deliver on your theory of change.”*

– **SOCIAL CHANGE PERSPECTIVE**

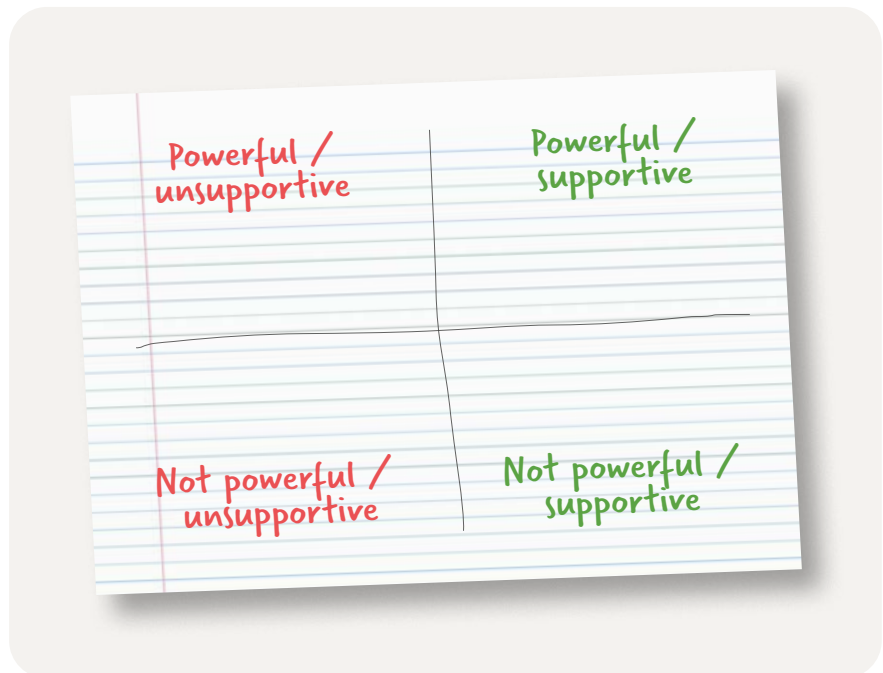




## Power analysis

Campaigning is about shifting the power dynamic within a system, building the influence of those in favour of change and reducing the influence of the status quo. A tool that can be used to analyse power is 'power mapping', where players on an issue are arranged on a simple axis (see figure below).

Power analysis helps campaigns identify who they are seeking to influence, valuable allies to work with and where to concentrate resources. Planning how to move 'players' around the power map can help create a plausible Theory of Change.



## Being target centered

Being target-centered in a campaign or advocacy effort means being really clear about the decision maker who can give you what you're after. Many, if not all, the other players in the power map can then be added and considered in relation to this 'target'. While this seems basic, it's amazing how often advocacy organisations present proposals to philanthropic funders with targets fuzzily identified as 'the general public', 'both sides of Parliament' or 'the Government'. Having a clear target in mind allows campaigns (and you) to focus your limited resources wisely.

This doesn't mean there has to be only one target – just that you've thought about it strategically. Anita Tang, formerly of Cancer Council NSW, described how in one of their campaigns they realised through power mapping that while the Health Minister was the ultimate decision maker, he would principally be influenced by a small number of MPs in specific areas. For this reason, they decided to support grassroots Cancer Council members engaging those few key MPs, rather than focus on engaging the Health Minister's own electorate, or running a state-wide public awareness campaign.

## EFFECTIVE MESSAGING

In a world where we are all bombarded with information, it's vital to have a compelling message to cut through in the clutter and ensure our investment in communications is highly persuasive.

However, a common issue is that people motivated to communicate or invest already know a lot about the issues at stake and common sense suggests that if only everyone knew the same 'facts', they'd 'wake up' and act. Unfortunately, studies have shown that exposure to facts is not particularly persuasive, and can actually cause some who hold a different view or interest to dig in. Spending millions on a campaign only for it to backfire would be a genuine pity!

Therefore, effective campaigns must adopt more sophisticated communications approaches, drawing upon the wealth of knowledge readily available in behavioral economics, cognition and linguistics.



**Effective campaigns tell their own story – figuring out the most persuasive arguments to ‘do the thing’, and repeating them consistently, over and over.**

We can get awfully caught up in what our opponents are saying about our issue, and end up designing all our comms in ‘rebuttal’ mode. Unfortunately study after study shows that myth busting actually reinforces rather than dispels the myths. Fighting on your opponents own turf, you end up repeating their messages and activating all the wrong associations for your audience. So if you see a potential grantee propose myth busting as a key part of their work, run a mile!

The way campaigns choose to name and describe the problems and their solutions strongly impacts results. At a basic level, talking about climate policy as a ‘clean energy policy’ (a positive, solution-focused message) vs a ‘carbon tax’ (an unpopular, cost-based, process-focused message) is likely to elicit much more support. When talking about a systemic approach to gambling reform, saying you’re trying to ‘prevent gambling addiction’ is much stronger than ‘prevent problem gambling’, as it clarifies the issue is with the addictive machines and their owners, rather than with the individual ‘problem’ person. As with mythbusting, it’s *vital* campaigners stick to their own way of framing things rather than accept the opposition frame, *especially* when it seems the opposition frame seems to have caught on (this is the hard work of re-framing).

Great messages are straightforward and direct – removing all the hedging and ambivalence that often creeps into policy discussions. Great campaigns use stories to help shape the issues and help them spread (people remember and share stories more than facts). And they think carefully about the messenger – quite often, the messenger ‘is’ the message.

As getting the message right is so important, message research often needs to be commissioned at the beginning of a campaign or advocacy project, and we’ll look at this more in the next chapter.

**Beware advertising agencies**

A word of caution. Many of these approaches are also found in commercial marketing, so there is often a desire to ‘hire an advertising guru’ to help with messaging. If they can sell soap or beer, surely they can sell criminal justice? Experience with advertising agencies is however decidedly mixed.

- Selling products is different to political causes in a range of nuanced ways (especially related to the values activated) and specific domain experience is almost always preferable.
- Creative agencies are used to working with large marketing budgets and advertising spends which are rarely available to nonprofit causes – which instead have their own unique channels, including strong ‘word of mouth’ through activist movements.
- Agencies can sometimes see nonprofit work, especially pro-bono, as an opportunity to train new staff or do outlandishly creative and ‘off-brief’ work their regularly paying clients would never allow, designed more to win industry kudos than social outcomes. Hire specialist expertise by all means, but stick with campaign and advocacy specialists.

# MOVEMENT APPROACH

**Achieving really big policy changes rarely involves a single campaign led by one organisation.**

Marriage equality for example had a driving organisation and strategy led by a central campaign organisation (which received the bulk of philanthropic investment), but a lot of heavy lifting was done by other organisations, acting either in coordination or entirely independently. Two organisations – GetUp and Victorian Trades Hall Council – devoted extensive staff and built essential technology and organising infrastructure that was used by volunteers across the campaign, much of it ‘unbranded’ and without seeking kudos. Hundreds of other organisations and thousands of individuals developed their own tactics and ways of getting involved. It may sound scary, but ‘losing control’ is often what success looks like – leveraging resources beyond the imagination of the campaign’s original architects and funders, but also allowing for innovation and experimentation at the grassroots level.

Successful advocacy efforts have (and should be able to articulate to you) a strong sense of their ‘place’ in an ecosystem, and how their work complements others. Advocates also talk about how often some of their most important work might be deciding not to do something under their own auspices, but rather influencing or actively supporting another organisation to do it in their name. For example, on refugee issues, legal advocates mentioned how one of the most time-intensive pieces of work was elevating unusual messengers such as medical associations. Here, a third party is getting the public spotlight.

For donors, there are a few considerations.

- One is the opportunity to fund efforts that foster a level of strategic or messaging alignment (while encouraging tactical diversity).
- Another is the need and opportunity to fund a portfolio of different initiatives and approaches to the same problem – for example, with targeting different constituencies and deploying different theories of change.
- And third, funders need to build informed and trusted relationships with organisations, recognising that they may be funding an organisation to do work that neither can publicly claim credit for.

*“Our success measure is that sometimes we’ll be less visible, such as Aboriginal and Torres Strait Islander work. We are talking to all of our funders to make sure they understand the impact we play. For example, we may do a lot of hard work to get another organisation [that is influential to the decision-maker] to do something publicly – all you see publicly is another organisation doing something good, but it’s actually due to our effort.”*



## – SOCIAL CHANGE PERSPECTIVE



*“In an example of failure, the funders were often at odds with each other, they didn’t line up their processes or timelines; they tended to operate in a competition model rather than a collaboration model on the idea that one would do it better than the others.”*

## – PHILANTHROPY PERSPECTIVE

# GREAT LEADERSHIP

**It's the big 'key person' question. How important is the person you're investing in? Should your strategy actually be to invest in a leader rather than a strategy, an issue or a particular organisation? Yes and no!**

At the end of the day, people drive campaigns, and factors like the experience, relationships, profile and mentality of a leader can make a difference to whether a campaign will win or lose.

## What to look for

- ✓ Demonstrated experience running or helping on diverse campaigns, rather than issue experts who are obsessed with policy, or people from the business world who are keen on a career change.
- ✓ Willingness to get their hands dirty by delving headfirst into the work at the right moments and getting the campaign into the real world; rather than someone who loves planning and preparation but is hesitant to ever let their products see the light of day.
- ✓ Lived experience of the issues and as part of the community most impacted by issue, providing authentic and trusted perspectives and ability to organise the base.
- ✓ Someone who is quick to make decisions, does so on the basis of information, and stays the course in the face of initial setbacks.
- ✓ A natural coalition builder with low ego who consistently prioritises the right strategy and messengers for the issue, over constantly putting themselves and their organisations' normal way of doing things forward.
- ✓ Someone who is personally self-reflective, listens, and relates well to others.
- ✓ People who build productive, high-calibre teams around themselves.

Because the quality of leadership can make or break a campaign, or really any type of project, it is rarely advisable to fund a large campaign without the key leader or staff already identified. This is particularly true in Australia, where the pool of talent for senior campaign leadership roles is shallow and recruitment is highly competitive – it cannot be guaranteed that a suitable candidate can easily be found. However, in situations where a campaign absolutely has to be mounted and no leader is present, careful consideration should be given to factors such as:

- Will the campaign be run out of an organisation with an extremely strong roster of talented campaigners and a history of successful recruitment in similar circumstances?
- Have those proposing the campaign tested the market so far – quietly approaching possible candidates – and what's been the feedback? Is it an issue of such prominence and short-term prospects for success that capable people will jump at the opportunity to take part?

At the same time, it is important for philanthropy to consider leadership more broadly than a single person. Indeed, a key measure of a leader should be whether they have built qualities of leadership, such as direction, inspiration, motivation, coaching, into the DNA of an organisation, alongside a broader circle of staff, board and volunteers, enabling the organisation or effort to be resilient to their almost inevitable departure. When investing in the long term capacity of an organisation, constituency or campaign, funders should actively consider the strength of leadership pipeline.

Finally, we come to the issue of level of experience. While the vast bulk of philanthropy is invested in older and prominent individuals, the truth is that age appears to have remarkably little correlation with success. Harvard's Marshall Ganz notes the prominence of young people in driving social change due to their sheer 'biographic availability' (ability to find the time), 'critical eye' (of their parents' generation) and 'hopeful heart'. Investing in young people within your portfolio also builds experience and capacity for the long term.

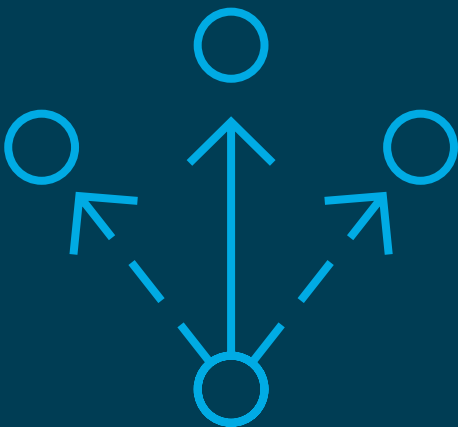


*“Leadership are first and foremost champions for their cause - building buy-in, exciting people, and explaining and translating it for different audiences.”*

– PHILANTHROPY PERSPECTIVE

# Understanding advocacy tactics

There are a great range of tactics used by campaigners and advocates – these are often major ‘moments’ for organisations, and ones they will seek funding for. It is important for philanthropists to understand the range of tactics, and when they are most impactful.



# COMMON FEATURES OF A GOOD TACTIC

Feature of an effective tactic	Example of this being done well 	Example of this missing 
<b>Part of a clear and logical theory of change</b>	If we can get a photographer into Nauru to collect photos of kids in detention, it will spark global outrage and shift debate around refugees in Australia.	If we can just get 100,000 signatures, the Prime Minister will definitely close offshore detention.
<b>Focused on real world impact</b>	Funding required to train firefighters as spokespeople on climate change to shift the conversation.	If we increase our Facebook following and redesign the website, we'll be able to shift the debate on climate change.
<b>Has a specific target</b>	Facilitating a press conference for Deliveroo workers who demand that their CEO provide them sick leave during a pandemic outside the AGM.	Open letter in a newspaper addressed to all gig economy companies asking them to provide sick leave during a pandemic.
<b>Measurable impact</b>	Marriage equality campaign reporting 800,000 calls to primarily young voters to increase plebiscite turn out.	Purchasing 'remember to vote on marriage equality' billboards in all capital cities across Australia.
<b>Uses research</b>	Developing impactful messaging using focus groups and dial testing with key audiences.	Launching a large campaign based on a witty, yet untested, hashtag from a staff brainstorm.
<b>Has a clear audience</b>	'Enrol to vote' digital advertising campaign targeting 18-24 year olds in marginal lower house electorate.	'Enrol to vote' advert on the front page of the Sydney Morning Herald.
<b>Impact is the primary focus</b>	A major climate mobilisation outside parliament, that includes a music performance.	A concert series that mentions climate change, but is primarily focused on the headline acts.



# COMMON TACTICAL AREAS

## Field organising

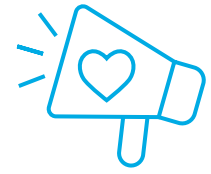
While there are many models of organising, they share a common focus of building grassroots people-power by organising people into powerful local community groups. Often this involves the employment of paid organisers, large scale volunteer recruitment, ambitious training programs and development of accessible resources. Developments in technology are creating exciting new opportunities, including peer-to-peer platforms that allow volunteers to 'self organise' without significant central staffing support.

Organising models are sometimes used in short-term projects (such as scaling mass voter contact during a referendum or election with volunteer door knocks and phone calls) but develop the most leadership in longer-term projects (such as creating and supporting a network of local action groups). Often these programs include significant training and leadership development programs, and can be a broader funnel for bringing in new leaders to social movements. A great domestic example of this is the Australian Youth Climate Coalition, who've trained tens of thousands of young people in advocacy over the past decade – many of whom have gone on to be elected as MPs or Councillors, win major campaigns, and lead large climate organisations.

### Considerations when funding it:

- Investing in organising is a **long term commitment**. Creating local groups, recruiting volunteers, training people and developing local leadership requires time and will often require multi-year funding commitments.
- Modern organising often **requires digital tools to scale**. This isn't an online vs. offline distinction, and investing in technology that allows communities to organise, communicate with each other and scale can be powerful.
- **Organising can be expensive, but is worthwhile**. This tactic can require larger amounts of money, for what may seem a smaller scale of reach – but that is because it is prioritising quality of engagement, over quantity. This tactic can be staff intensive, requiring significant investment, and involve more administrative style costs including travel, printing and events.
- Organising is less likely to create self-sufficient funding streams so will **continue to need philanthropic support**. The primary goal is to create people-power and empower individuals to donate their time and skills to a movement, rather than their money (often a by-product of more digital campaigns with a broad audience).
- Elections are often a peak moment for funding, but **movements need to organise across electoral cycles to build lasting power**. Done well, an organising program will continue over many years, rather than being launched 6 months before an election and wrapping up immediately after.

*“The biggest factor was that there was already investment by the organisation in developing an organising structure, building up local networks and leaders who were really ready to just get going, and had been sufficiently trained and briefed that they could take the initiative. What that means for organisations being able to win campaigns is the hidden, sunk cost of investing in people infrastructure.”*



– SOCIAL CHANGE PERSPECTIVE



*“If you’re looking at an organising approach, it’s not just about winning for now, it’s about changing the way people think about things, and how active they are in society.”*

– SOCIAL CHANGE PERSPECTIVE



## Digital engagement and mobilisation

The last decade has seen a huge uptake of digital advocacy, harnessing online tools to mobilise people to influence decision makers. This work is often fast-paced, reactive and can rely on large amounts of growth with lower-barrier actions. All digital advocacy requires development, acquisition of a supporter list and production of engaging content to capture attention in a crowded digital media landscape.

There is a huge spectrum of digital tactics commonly used including petitions, mobilising people to contact a target, distributed fundraising, awareness raising with social media content. These tactics on their own can easily be ‘clicktivism’ – but with the right strategy, a clear target and a strong theory of change digital tools can mobilise millions of people to have a huge impact.

### Considerations when funding it:

- Unlike organising, digital campaigning has the potential to **create a return on investment** with a sustainable fundraising model. Campaigns should scale to recruit a broad base of supporters who will consider making one-off and regular donations.
- Make sure the campaign is **focused on real-world impact** rather than a vanity metric. The primary goal should always be measuring actual progress towards the campaign objective, rather than just exciting digital analytics, like building a list or the number of people reached on social media.
- Organisations **should have a track-record of digital impact** before launching a large-scale effort. Done well, these campaigns often require multiple highly qualified specialists in content production, web development, marketing.
- **Strategy is still the key to success**, not just clever marketing. Marketing agencies will often be able to launch very clever campaigns – but without a well-crafted strategy and a clear theory of change these campaigns will fail to have an impact. Look for campaigns that are backed by strategic thinkers, rather than digital nomads alone.
- **What works is constantly evolving**, as technology, online platform algorithms and the way people engage online shifts. In recent years, we have seen an accelerated shift away from branded, institution-driven online campaigns dominated by email, to distributed micro-influencer led campaigns on video platforms.

## Shifting the narrative: messaging, advertising and media

The broad public conversation around any topic can often set the limitations of what advocacy wins are possible. Discourse and debates around climate change, refugee and social welfare have set back progress in many policy areas for decades, impacting thousands of lives. Advocacy campaigns can play an important role in developing well-tested messages that can change hearts and minds, and shift the narrative around an issue – allowing the policy debate to progress significantly. Strong recent examples of this work in Australia are the efforts to highlight the children locked up in offshore detention centres, or the prominence of firefighters connecting bushfires and climate change during one of the nation's worst ever fire seasons.

This work isn't simple, or cheap, often requiring significant investment in professional message research, including focus groups and dial testing, and then media training for powerful spokespeople. Then, once a message and messenger are prepared, it can be costly to distribute a message and cut through a noisy media and digital media landscape so that target audiences hear and remember your voice.

### Considerations when funding it:

- Messaging projects **should always rely on research and testing**, using qualitative and quantitative research methods such as focus groups and dial testing. A clever message developed by a small group of staff, but not tested with a broader audience, is an immediate red flag. Messaging research is expensive, so groups, especially new or grassroots ones, will often need financial support to partake in this crucial step of campaign development.
- Beware of projects looking at creating new messages for the sake of originality. Often **sticking to an existing, effective, tested message** is less exciting for the staff executing the campaign, but far more resonant with the broader public. Messages need significant repetition to stick.
- **Avoid myth busting efforts**, they often repeat an opposition's frame and solidify the myth rather than busting it, doing more damage than good.
- Messaging projects **should have very clear target audiences**, if not specific individuals in mind they are trying to influence. Demographic analysis of a strategic audience is required when planning a messaging campaign, and testing should be done specifically with that group. In most cases, distribution tactics will be more effective and less costly if targeted to reach that audience with narrowcast communications (for example digital advertising, strategically located billboards) rather than broadcast to the general public (front page of newspaper, TV ads, nationwide billboard campaign).
- We need to **invest in powerful spokespeople**, not just the message they are delivering. Unique voices from diverse backgrounds, ideally with lived experience of the issue they are speaking on, will be far more powerful than just having CEOs be the spokesperson for their campaign. This will require investing in training, coaching and pitching support for individuals without previous media experience.
- Due to the centralisation and growing bias in the media landscape, media campaigns also now **require direct investment in journalism** – supporting outlets that will report on advocacy projects.
- **Storytelling is far more powerful** than facts. Investment in video content, including longer-form documentary storytelling as well as supporting people with lived experiences of issues to tell their own story online and in the media is a powerful tool for shifting a public conversation on a topic.

## Research and policy advocacy

Often progress on an issue relies on thought leadership – developing clear policy proposals, compelling research on a problem or opportunity and distributing this information to decision makers or specific constituencies to build momentum. Policy advocacy, lobbying and research can help reduce the barriers to change and create exciting opportunities. Unlike previously mentioned advocacy tools, this work does not always require the mass mobilisation of people-power – but if accompanied with digital distribution, a local organising approach or powerful spokespeople, it can be even more influential.

### Considerations when funding it:

- **Make sure the project has an impact lens**, with a clear purpose. If the research is on a social or environmental policy area, but doesn't have a clear purpose for how it will create change, it is purely academic rather than advocacy focused.
- **Research can be used as a powerful tactic** within a campaign, it can create a media moment, help shift public narrative, or influence a decision maker directly. This will require a clear outreach, distribution or socialisation strategy so that the report findings don't just sit on a shelf, or aren't just read by the converted.
- Presenting information within a campaign **can be creative**, and shouldn't just be limited to lengthy reports. Sending investigative reporters to Nauru to collect powerful images of children locked up in detention is a recent example of information collection that has been very impactful.
- Influencing decision makers **often requires experienced lobbying**, and a deep understanding of power and political process. Investing in lobbying capacity requires more than just delivering a petition to the doorstep of elected representatives.

## Strategic litigation

While advocacy is focused on pressuring a target to make a certain decision, often a legal framework can directly create change in the courts, or indirectly influence the conversation around a specific issue. Increasingly around the world strategic litigation is being used by local communities as a tool for protecting the environment from extractive industries, with major recent wins in Australia led by the Environmental Defenders Office being great examples of the power of litigation being used within a broader campaign.

### Considerations when funding it:

- Litigation can be expensive and **can require significant investment to create an impact**.
- **Be clear on the primary purpose** of litigation – whether the case has the potential to win, whether the goal is to cause delay and disruption or whether the main objective is shifting the public perception on an issue. All of these goals can be useful in an advocacy landscape.
- Understand the **legal restrictions** around joining litigation with other forms of advocacy, especially bold digital communications. Depending on the court involved, strict contempt laws may impact the benefit or harm that broad public communications and support can play.

## Civil disobedience and the ‘rebel’ role

Bill Moyer articulates a clear outline of four social movement roles – the citizen (individuals taking action as a collective), the reformer (who used official channels such as lobbying and litigation to create change), the change agent (who builds widespread people-power, often using organising or digital tactics) and the rebel (using protest to highlight injustice). This fourth role is arguably the smallest cohort in Australia, but has a track record of creating significant impact, often with little resources.

From the massive protests against the Franklin Dam and to Stop Black Deaths in Custody, to smaller targeted actions like Christian leaders gathering to pray for refugees in MPs offices or people surrounding the hospital where a baby refugee was at risk of deportation, these actions can have a significant impact. The role of the 'rebel' is to expose injustice to the broader public and to state a clear 'no' to the injustice continuing. The courage, story-telling and scale of these actions means they can be one of the most powerful levers to quickly shift public perception of an issue.

### Considerations when funding it:

- Protest can be difficult to fund as it is rarely organised by organisations with DGR status, and often by individual organisers where there is no clear entity to fund. Because of this, these tactics are severely underfunded.
- **Protest is most powerful when it captures the imagination of the public and clearly shows, rather than tells, the problem and solution.** One area that could be funded is providing training and support to grassroots organisations in relevant skills including messaging, media and campaign strategy.
- There have been significant restrictions on the right to protest over the last decade, and the rules differ in each state and territory. Providing funding to organisations that advocate for the right to protest as a critical part of democracy is a gap, as well as ensuring organisers have the resources to access adequate legal advice and funding for logistics and training.



*“One measurement, the rubric we probably use – in measuring the potential impact is how many powerful people are going to be pissed off about this. If no one is going to be angry you’re not going to make any change.”*

– PHILANTHROPY PERSPECTIVE

## Building and protecting civil society space

As well as campaigning on a number of issues, changemakers in Australia increasingly need to work together on the 'meta campaign' to protect civil society. Increasingly, broad efforts to protect our rights to protest, gather and launch advocacy efforts are required.

### Considerations when funding it:

- The last few years have seen the growth of important new organisations focused primarily on protecting, or ideally expanding, civil society space, including the Australian Democracy Network, the Centre for Public Integrity and increased work by groups such as Climate 200.
- The **need for this work will probably continue to increase**. As the sector continues to have an impact, power holders may look to further limit and reduce the capacity of advocacy organisations and activists, making this work more important than ever.



## Capacity building

While directly campaigning for impact is crucial, there is huge potential for increasing the capacity of civil society to create change over coming years. There are many opportunities, including widespread skills building, investing in fundraising tools and staffing, developing shared resources and facilitating increased cross-sector collaboration. This work can be done on two levels:

- 1. Increasing organisational capacity:** activities include investing in hiring additional staff, training existing staff and senior volunteers, and strengthening the organisation on multiple levels to make it more investible. There is no organisation in Australia that would not benefit from some form of capacity building – some require investment to increase their capacity, others to increase their efficiency, impact or competence. Direct investment is likely required initially, but in most cases it should be structured to support the organisation to develop sustainable fundraising streams with donor acquisition, fundraising staffing and growing small, medium and large regular donor programs.
- 2. Movement capacity building:** often increasing capacity can be done more efficiently across the entire sector. Many organisations share the same challenges and barriers to impact and shared resources can help us all improve collectively. Trainings can be run centrally, increasing skills and expertise across multiple organisations simultaneously. Tools can be developed collectively, or existing resources can be made open source to support each other. Investing in cross-sector relationships and facilitating collaboration can not only increase impact but help advocates realise their potential by exposing them to high-quality work.

### Considerations when funding it:

- **Invest in long-term capacity building projects,** not one-off projects. Developing leaders and powerful organisations won't happen overnight and requires time.
- The direct impact of capacity building **can be hard to measure,** with the achievements of programs often being in staffing development, relationship building and increased potential for future projects rather than immediate results.
- Funding **cross-sector capacity building can be more efficient** than funding internal capacity building for a specific organisation. If funding a training program for a small cohort of staff, it can be worthwhile expanding this to be a centralised program that supports multiple organisations.

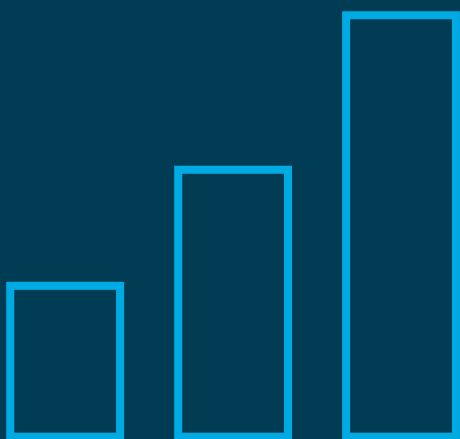
*“Philanthropists should be thinking about investing in capacity building not just a campaign – investing in building a movement of people who care about the broad suite of issues.”*

– SOCIAL CHANGE PERSPECTIVE





# Advocacy portfolio design



# INVESTING IN CORE, CAMPAIGNS AND/OR INDIVIDUALS

Once you've set your strategy, it's time to decide how you'll structure your giving – will you invest in core capacity, campaigns, and / or individuals?

**Core funding is an investment in capacity for the future** – it's about building the long term infrastructure for an organisation to succeed. Capacity building includes strengthening an organisation's skills, relationships, leadership, operational systems and income streams to ensure sustainability now and into the future.

**Campaign funding is an investment in a specific policy change or result** – it's about investing in a clear strategy with tangible and measurable outcomes, usually over the short to mid term.

**Funding individuals is about accelerating the impact of emerging and established thought-leaders** based on their specific needs, which can range from training and professional development to capacity building for their organisation, or seed funding for a new project.

To maximise your impact, ideally you'll build a portfolio that supports each of these categories – with each playing a different role in building the movement and creating change.

Here are some **guiding principles that apply, regardless** of how you structure your giving:

- ✓ Invest in an existing strategy – you don't need to create it yourself.
- ✓ Ideally invest on a long-term basis, and offer top-ups during key moments or windows of opportunity.
- ✓ Invest in ecosystems by building and supporting a portfolio of organisations who play different roles in the movement (for example – large players, grassroots groups, individual leaders, strategic litigation and policy research).



*“When looking at your share portfolio, you need stuff that is going to perform over the long term – rather than just play the stock market. You need to look ahead to trends, vulnerable spots, and emerging opportunities. It's the same with social change – but a lot of [philanthropists] act impulsively.”*

– PHILANTHROPY PERSPECTIVE

## Core funding

Core funding is **untied** and **given unconditionally** to an organisation. It's typically the **most flexible type of funding** and allows organisations to allocate on an as-needs basis – for example, towards expanding the team, shifting capacity to an under-resourced project, or investing in updates to tech and infrastructure.

By deciding to invest in core funding, you're investing in future capacity, and trusting the organisation to do what it does best – making strategic decisions to increase impact.

### Why fund core?

- ✓ **Core funding acts as a guarantee for an organisation's most valuable resource – their staff.** Uncertainty over funding often restricts organisations to short-term contract arrangements, making it difficult to recruit and retain high quality staff. Permanent, ongoing contracts are attractive options for staff, giving organisations a competitive edge during the hiring process.
- ✓ Core funding gives certainty to an organisation, enabling **longer-term planning for a big picture change agenda.** Organisations with ongoing core funding can realistically plan for a 5-10 year horizon, while organisations scrambling to pay staff beyond the current financial year are often forced to plan reactively, as funding permits.

### Considerations:

- **Strategic decision making:** Does the organisation have a proven capacity to make strategic decisions, particularly in relation to core costs, such as moments to expand the team or take on growth risk?
- **Skills and gaps analysis:** Can the organisation clearly articulate the challenges they need funding to overcome?
- **Evaluation:** Does the organisation have the capacity and systems to measure and track their progress?
- **Ambition:** Does the organisation have a bold and courageous agenda worth backing?

*“Funding core operations is very important, we try to ask funders to invest for three years; everything [fundraising related] is hard work and that creates challenges for staffing, if you want to attract and retain good staff you need to give them certainty. Greater core funding allows us to plan with much more confidence and allows us to do strategy much better.”*



– SOCIAL CHANGE PERSPECTIVE

## Campaign funding

Funding a campaign is an investment in a **clear strategy** with **tangible and measurable real-world outcomes**, usually over the **short to mid term**.

### Why fund campaigns?

- ✓ Shifting national policy or influencing major corporations and decision makers doesn't come easily, or cheaply, which is why sustained campaign investment is so important. Often campaign funding will support a specific organisation to execute a strategic project, but it can also be structured to support a coalition of groups working together.
- ✓ Care needs to be taken to make sure specific projects are connected to a broader movement – avoiding creating short-term campaigns that focus on easy wins rather than a strategic step within a broader long-term campaign plan.

### Considerations

- **Strategy:** Does the campaign have a clearly articulated strategy with a robust theory of change, critical path, power map, understanding of targets, tactics that build a path to victory and an ability to articulate what winning looks like?
- **Leadership:** Does the campaign have the diversity of people, skills and, if necessary, organisational reputation required to win?
- **Track record:** Do campaigners have a track record of success using these tactics and do the tactics have evidence of creating an impact elsewhere?
- **Partnerships:** Is the campaign isolated or are they looking to build a powerful, diverse network or coalition of voices calling for change?
- **Post win:** Is the campaign just a flash-in-the-pan or are they building a plan to build a sustainable movement of supporters, with next steps for the individuals and infrastructure that created an impact?

## Funding an individual

Funding an individual is about directly investing in their capacity to scale impact. Supporting emerging leaders is just as important as investing in organisations and campaigns.

### Why fund individual?

- ✓ Thought-leaders can have **diverse and varied experience** in building movements to shift power on their issue. Often individuals have the capacity to work across **multiple projects** at once, and can be **far more nimble** than organisations with large overhead costs and processes.
- ✓ Individual advocates worth backing will show significant persistence through learning from failure, and strategic insight to know when to stick with a plan, and when it needs revising.
- ✓ They can be very well connected across social movements, and have the ability to build buy-in and shared understanding from a network of organisations and other campaigners.
- ✓ Funders can accelerate the impact of emerging and established thought-leaders based on their specific needs, which can range from training and professional development to capacity building for their organisation or seed funding for a new project.

### Considerations

- **Role in the movement** – They are seen and respected as a leader in the movement. They are aware of their place and role and aware of how others are collaborating to a collective effort, afterall, one person alone can't solve the intersecting crises we're facing.
- **Leadership qualities** – They understand their issue in the context of bigger picture politics, are incredibly well connected and bring a unique, rounded skill set to their work.
- **Vision** – Invest in people with pragmatic vision. Find people with fire and conviction and an ability to articulate from tactic to big picture real world change.



*“For us, it comes down to the individual a lot – someone with a bit of experience behind them looks like more of a likely bet than someone with no real life experience. At the same time, the drive is really important, the real sense that someone is going to keep going at this. You can tell when someone has that fire and conviction; you get a feel for that, it’s a critical ingredient.”*

– PHILANTHROPY PERSPECTIVE

*“Just be strategic, smart, aware. Even if you don’t want to be the public face, or sign on to the most radical piece of work, there will always be something that you can do. Look for opportunities where you can contribute a building block.”*

– PHILANTHROPY PERSPECTIVE



# UNDERSTANDING THE ROLE OF DIFFERENT ORGANISATIONS

## Peak bodies

**Who?** Peak bodies represent the allied interests of stakeholder member organisations and most often have DGR status. Examples include the Australian Council of Social Services, Australian Council for International Development, the Federation of Community Legal Centres and the Refugee Council of Australia.

The foundational support afforded to an organisation with a broad member base brings with it funding stability and the freedom to focus long-term on member issues. The established reputation that comes with their convening role often goes hand-in-hand with an 'open-door' to government and key decision makers.

Diversity of interests, as well as a strong overview of what's happening 'on the ground', are arguably some of the greatest strengths of a peak. But at the same time, this diversity of opinion can present as an Achilles' heel, forcing a peak to favour popular consensus over bold and ambitious policy agendas.

### Considerations

- **Reputation in Canberra** – What presence does the organisation have on the ground in the nation's capital? Do they have established relationships and a track record of shifting power across the political spectrum, particularly with crossbenchers and unlikely allies?
- **How do they centre lived experience** – Look for a demonstrable commitment to centring the voices of affected communities and shifting resources in their direction. This requires peaks to think beyond the one degree of separation between them and their members.
- **Media presence** – Does the organisation have an established media profile, backed in by a savvy media team who use effective messaging?
- **Theory of change** – Can the organisation clearly articulate a theory of change and how their individual policy goals paint a bigger picture vision for systems change?
- **Speed and clarity of decision making** – Be aware of unwieldy decision making processes, which have the potential to impede nimble, tactical innovation.

*“Does this organisation demonstrate how they are shifting resources to the affected population? Do they platform organisations with lived experience? Are they transparent and accountable to the populations they work with?”*



– SOCIAL CHANGE PERSPECTIVE

## Established advocacy organisations

**Who?** Australian Conservation Foundation, Amnesty International Australia and CHOICE represent some of the most established advocacy organisations in the movement.

With a significant stream of funding coming from regular donors, these big players operate with a high level of flexibility and independence, as well as specialist staff teams with permanent roles across policy, campaigns, digital, media, finance and fundraising.

While this scale conveniently brings reliability, household brand recognition and the ability to plan long-term, the flip side is an organisation that can sometimes move more slowly compared to smaller, more nimble counterparts, who are capable of shifting direction rapidly in key moments. With a history of being a leader in their field, bigger organisations can sometimes also lack the burning platform to collaborate with others – *why change now when we've always done things this way?*

### Considerations

- **Leadership** – Can the leader demonstrate they've achieved what they set out to achieve, as well as evidence of rapid response advocacy in critical moments? Do they understand how their issue intersects with others, and demonstrate their organisation's role in achieving systems change? Do they have a risk appetite and willingness to innovate, or are they 'too comfortable' with existing assumptions and processes?
- **Recent wins** – How has the organisation built public pressure and shifted political sentiment in the past year?
- **Media profile and 'household brand recognition'** – Does the organisation have a media profile? Note that critical coverage can often be a sign they're doing the right thing!
- **Where's the money being spent** – Do project budgets direct significant funding towards campaign activities (preferable), or does the vast bulk of funding cover staff (usually less desirable)?
- **Evidence of diverse partnerships** – How does the organisation work with others in the space, particularly grassroots advocates, and do they value collaboration and sharing resources, such as messaging or training guides? Comments like *"no one else is doing this"* can sometimes show a lack of connectedness with the sector.

## Service delivery organisations

**Who?** Mission Australia, Brotherhood of St Lawrence and Settlement Services Australia are some of the biggest, most recognised service delivery organisations in Australia.

These organisations often have unique data sets and insights from their own service delivery, as well as a close connection to individuals with lived experience, and a high level of trust and government access – all incredibly valuable tools and tactics for shifting public perception and political power on an issue. Despite this, very few service delivery organisations actually run public campaigns, and when they do, they're typically conflict averse and slower to move.

Perhaps the biggest consideration when it comes to funding advocacy led by service delivery organisations is their ability to 'bite the hand that feeds them' – aka the government. So while their delivery of essential services opens the door to reliable funding, unfortunately it also acts as a gag when it comes to speaking out against the entrenched systems they operate within.

### Considerations

- **Empowering the communities they serve** – How does the organisation integrate service delivery with advocacy, do they centre the voices of affected communities and build their capacity to speak out?
- **Prioritisation of advocacy** – Does the organisation have a track record of involvement in campaigns, can they demonstrate lending weight or influence to advocacy coalitions on their issue?
- **Government relations expertise** – What presence does the organisation have in Canberra, do they have strong government relations expertise and an open-door to the decision makers across the political spectrum?
- **Diversity and experience of Board / Chair** – Does the organisation have a diverse and relevant board that represents both lived experience of the communities they serve, as well as advocacy and government relations?



## Capacity building organisations

**Who?** Intermediary organisations who work to build capacity across civil society, or within a specific sector – for example, Australian Progress, who build the advocacy capacity of civil society to achieve systems change, and The Sunrise Project, who scale social movements to drive the transition from fossil fuels to renewable energy.

Capacity building organisations have a unique overview of the sector they work in – be it civil society more broadly, or an issue-specific movement (such as climate). They're deeply networked, and their capability is closely dependent upon the quality of their often complex relationships with stakeholder organisations. Such trusted relationships and oversight that's broad and detailed at the same time makes these organisations well placed to identify strategic capacity gaps and respond accordingly.

Although capacity building and intermediary organisations can have diverse income streams (such as earned income and regular donors), their income is often reliant upon philanthropic donors invested in systems change. Close working relationships between donors and these organisations can lend itself to a higher level of comfort with larger grants. In turn, intermediaries are well positioned to support partner organisations, either by re-granting or other means (such as training, access to centralised resources, playing a convening role and fundraising support to fill capacity gaps).

### Considerations

- **Relationships within the sector** – How well does the organisation know their sector, what systems do they have in place to remain 'on the pulse', scope for issues and identify gaps in perpetuity?
- **Relationship with donors** – Does the organisation have a strategy to engage a broad donor base and connect them with projects aligned to their interests?
- **Scale of ambition** – Does the organisation have a vision for bold, systems change and incentivise stakeholders to adopt a like-minded approach? Are they motivated by a broader mission to strengthen civil society or their sector?
- **Leadership** – Does the organisation lead in the sector, connecting others, distributing information and supporting more resource-constrained allies?

## Legal organisations

**Who?** Human Rights Law Centre, Consumer Action Law Centre, Environment Defenders Office, National Justice Project and state-based Legal Aid are examples of advocacy-aligned legal organisations.

Often these organisations will work closely with established and early stage advocacy organisations to deliver strategic litigation elements of broader advocacy campaigns.

They have a unique power as a credible, trusted and authoritative voice on the domestic and international legality of social issues, and have a track-record of significant impact.

Increasingly some legal organisations are expanding legal reform capacity, not only winning cases in the courts but building strategies to impact broader legal frameworks related to civil society, and the issues they focus on.

### Considerations

- **Impact focus** – Is the legal organisation focused on advocacy, and creating a strategic impact?
- **Connections** – Do they work closely with other advocates, especially front line organisations and individuals experiencing the impacts of social and environmental issues first hand?
- **Communications** – Do they communicate the power of strategic litigation with the broader public, and build a groundswell of support and understanding, or do they litigate mostly behind-the-scenes out of sight of a broader supporter base?

## Think tanks

**Who?** Per Capita, Centre for Policy Development, The Australia Institute and Grattan Institute are some of Australia's leading advocacy-focused think tanks.

Advocacy-focused think tanks can have a unique power to develop credible, detailed policy proposals and equip other groups with the research required to spark media attention, influence decision makers or highlight a specific issue.

### Considerations

- **Impact focus** – Is the research project or policy development focused on advocacy, and creating strategic, real-world impact?
- **Public facing communications** – Will the project be designed to be promoted publicly, rather than just in academic circles, and is the think tank connected with communications specialists to use findings to shape public discourse and narrative on the issue?
- **Connections** – Are they connected with other civil society groups leading advocacy efforts on the issue, both in directly influencing decision makers and communicating with larger social movements on the topic?



*“There is no point doing research unless there is a plan for amplification.”*

– PHILANTHROPY PERSPECTIVE

## Coalitions

**Who?** Raise The Rate, Change the Record and Stronger Charities Alliance are examples of recent cross-sector coalitions.

It takes different skills and relationships to build a successful coalition campaign, from messaging to organising, media to digital; and work in the community or in Canberra. Organisations are stronger in one area than another – and that’s where a coalition comes in. Organisations should have distinct roles in a coalition, where the sum of their parts is far greater than each individual contribution.

Detailed power analysis is necessary for building an effective coalition, with thought given to the power required to have an impact and the credibility and assets that each partner organisation can offer. This multi-pronged approach to strategy can create better chances of shifting a decision maker through a diversity of connected tactics.

It often can involve organisations of diverse sizes and styles – bringing together established advocacy organisations with startups, legal organisations and think tanks. Due to significantly different working styles and governance structures, this can often require centralised facilitation and coordination capacity and clear decision making processes.

### Considerations

- **Alignment** – Does the coalition of groups have an aligned vision for the project, or are they likely to compete? Are there competing priorities and tensions particularly over fundraising, spokespeople, reputation and risk?
- **Decision making** – Does the coalition have clear decision making processes for both proactive planned choices and reaction decisions? Are these processes nimble enough to operate in a rapidly-evolving campaign environment?
- **Purpose** – Interrogate the strategic reason behind the coalition. Is there a clear case for the strategic value of the collaboration or is the primary reason something else than impact?
- **Funding goal** – Are they seeking funding based on a shared interest, or do they have a strategic reason to work in coalition? Seeking funding based on shared interest doesn’t necessarily equate to strategic coalition.

*“Aboriginal and Torres Strait Islander organisations (for example) are so restricted and controlled in what they’re allowed to say in exchange for their Government funding; [therefore] coalitions can be really powerful for such groups to get around that, and say what they want to say.”*



– SOCIAL CHANGE PERSPECTIVE

## Startup and early stage organisations

**Who?** Democracy in Colour, Fair Agenda, Australian Parents for Climate Action, Australian Democracy Network, Unharm, Better Renting and Digital Rights Watch are just some of the Progress Labs alumni, but there are many powerful new organisations emerging every year to address gaps and new issues in the civil society landscape.

They're nimble, innovative and experimental, and embracing new organising models and approaches to narrative and digital advocacy. In turn, they need early adopters – angel investors – prepared to make the earliest investments before anyone else. *Why?* Investing early doesn't mean you're a forever funder, it's a show of support that allows early work and can leverage other donors.

Your donation can be make or break for these organisations – the proportionate scale of impact is much larger than investing in a large, established player. For example, investing \$20K in a startup has potential for huge impact, but will make very little difference for an established player.

### Considerations

- **Strategic plan** – Does the startup have a concrete mission and theory of change?
- **Bold founder** – Is the project led by an experienced, courageous leader with dedication, personal motivation plus hard skills in campaigning, digital, communications and/or organising? Do they have a personal connection to the issue they are working on?
- **Core team** – Does the founder have a close team of core volunteers and allies surrounding them or are they working alone and unsupported?
- **Governance / board** – Does the organisation have a skills-based board who support innovation and will help the founder manage risk?
- **Scope to scale** – Does the organisation have a plan to build a supporter base, sustainable revenue streams and the organisational structures to scale and have an impact?

*“Would I invest in a small new organisation or big established one? A small new organisation every time – from a very pragmatic perspective; big established players are more able to raise funds, so your investment won’t make or break the organisation.”*



– SOCIAL CHANGE PERSPECTIVE



*“We have the flexibility to fund early stage, whereas other funders can’t take those risks. By providing early stage catalytic funding, they can prove their concept and get other funding.”*

– PHILANTHROPY PERSPECTIVE

*“When funding startups you’re looking at people. While you’re still looking at runs on the board, you’re also looking at the other stuff they’ve done before – who are their contacts, who is willing to speak for you, who are your other backers and do I respect their judgment.”*



– PHILANTHROPY PERSPECTIVE

## Grassroots movements

**Who?** School Strike 4 Climate, Dhadjowa Foundation and the Antipoverty Centre are examples of grassroots movements that often rely on significant volunteer supporter based and in-kind support but can leverage significant impact with small injections of funding.

Often leaders of these groups have significant legitimacy on the issues they work on because of their lived experience of the impacts of that issue. A strong recent example of this is the school students striking from classes to demand a safe future and action on climate change. This motivation and energy can often inspire other players to join a campaign.

Due to resource constraints, grassroots groups are not expected to always ‘have the answers’ or the detailed economic modelling, but rather to push bold big picture demands and generate a groundswell of public support or outrage.

### Considerations

- **Lived experience** – Does the organisation centre lived experience and empower its members to be more engaged in the issue affecting their community?
- **Support structures** – Does the group have organisational structures to help it grow, make decisions and manage risk including a governance board or advisory council, strong volunteer pathways, and mentors offering ongoing support?
- **Recent wins** – Does the organisation have a track record of creating an impact? Are they able to regularly mobilise a constituency of people to take action, do they have a clear audience they are targeting and a theory of change around how to have an impact?
- **Partnerships** – Do they have a relationship with established organisations including administrative capacity?

*“Part of why our funders and partners are getting involved is because they wanted to say and do things through us that they could not say and do themselves.”*

– SOCIAL CHANGE PERSPECTIVE



## Multi-issue

**Who?** Over the past decade a number of multi-issue organisations have grown significantly, often using a mix of digital campaigns and offline mobilisations to build supporter databases of millions of people taking action on a number of different issues. Examples include GetUp, SumOfUs and AVAAZ.

These organisations have often led in the development of digital tools, which has resulted in large online growth. In recent years, many are increasingly organising for these online supporter lists to take action offline – at major mobilisations in the streets, in-person petition deliveries or in local supporter group programs.

They are known to work on rapid response campaigns, often prioritising short-term strategies that can have a major impact on an issue in the headlines at a certain moment. To do this they must have nimble structures that allow them to quickly pivot resources and capacity into major moments.

Through large digital lists these organisations can have strong, sustainable fundraising streams through small donations, both one-off and regular, from their expansive donor list often for specific tactics (for example, help us buy a billboard outside the PM's office) but often still rely on major donations for core funding or less public-facing projects that their supporters are less likely to fund.

### Considerations

- **Lived experience** – does the organisation empower people with lived experience and centre their voices in campaigns?
- **Track record of rapid response** – Does the organisation have capacity to respond quickly in a moment, or pivot a campaign where necessary?
- **Wins** – Does the organisation have evidence of recent wins and a track record of real world impact, or is their success primarily internal around 'vanity' metrics? Policy wins are far more important than significant email list growth.
- **Media voice** – Has the organisation built a wide reach in mainstream media with frequent coverage of their campaigns? Does their opposition often speak out against them?
- **Role in the movement** – Are they collaborative? Do they support smaller, grassroots campaigns with their significant resources?

## Creative and strategic agencies

**Who?** A number of impact-driven creative agencies exist that service the other organisations mentioned in this list. Examples include Purpose, ThinkHQ and Essential.

These groups should not be ignored, as they play a crucial role in supporting civil society to be more effective and impactful. We can't win change without integrating storytelling and reaching new audiences via different mediums.

These agencies are often a collection of highly-skilled staff who can offer creative services such as videography, photography, web development, branding and messaging.

### Considerations

- **Strategy** – What makes the agency impact driven? Do they have a clear vision, strategy and analysis of how they can support organisations to have an impact?
- **Accessibility** – Are they set up to be available and priced appropriately for the nonprofit sector, or are they likely to primarily work with corporate clients with the occasional advocacy project on the side?
- **Understanding of sector and audience** – Have they worked on advocacy projects before and have a clear understanding of the audiences groups will be trying to engage?
- **Connections** – Are they well connected with creative specialists as well as influencers and spokespeople who may be able to help your campaign scale?



# LEGAL STRUCTURE AND OTHER CONSIDERATIONS

A lot of times discussion about philanthropic investment in advocacy gets legal very quickly. This is a mistake, because it over complicates matters.

## Advocacy and campaigning is legal and everyone can do it

Advocacy and campaigning is 100% legal and done by all types of nonprofit organisations in Australia, with just a few caveats (notably for organisations registered as ‘Public Benevolent Institutions’ who must conduct it as an ancillary area of work – in practice many PBIs are very large and their advocacy forms a small part of their overall budget). Further, having Deductible Gift Recipient (DGR) Status status does not impact an organisation's legal ability to advocate.

## DGR status is sometimes required – but do check, because it has created a broken market

DGR status is preferred by some philanthropic donors because such donations are tax deductible. In addition, in the last decade many philanthropists have opted to put their money into Private Ancillary Funds (PAFs), which themselves hold ‘Type 2’ DGR status. Once put into a PAF, such funds can only be granted to other ‘Type 1’ nonprofit organisations that have DGR status themselves.

Unfortunately, it's a bit hit and miss as to which nonprofits have DGR1 status. Typically, those that do have it because they fit neatly into a fairly arbitrary set of boxes established under charity law (such as the Climate Council, which clearly has preserving the environment as its focus) OR (and this is more the case when nonprofits focus on multiple issues or take an intersectional or more innovative approach to their work) because at some point in the past they have been specifically written into the Tax Act by Parliament.

In our view, this limits innovation and effectiveness in the charity sector because there is a somewhat uneven market with tax concessions granted to very established players and ‘status quo’ approaches and ideas – but it is what it is! (The regulatory regime is also under review by the Government as of April 2024).

Not all philanthropic foundations have these restrictions – many can indeed give to a much broader range. In some cases foundations have adopted the ‘DGR only’ route without fully exploring their options.

## Avenues if the cause or organisation you want to support doesn't have DGR?

In some cases, you may just decide to forgo the tax deduction, as you would with any other type of discretionary expenditure that you feel like making. One donor once said to me it didn't really matter to them – it was either donate to the cause, or buy a new tractor for their hobby farm. Both are things they wanted, and at the end of the day they actually probably had enough money for both. This may mean you end up giving a little less overall, but to more effective organisations (and the government and broader public thank you for your taxes!).

Alternatively, if you do really need the DGR status – for example if your funds are in a Private Ancillary Fund – there are a few options, although these really need to be initiated and organised by the nonprofits, rather than by you.

- Give to a coalition effort, where work is conducted by a range of players with differing tax status. Your gift would go to the central or key partner (with DGR status) in the coalition and which agreed to distribute the funds to other non-DGR partners to deliver specific work.
- Give to a DGR charity that agrees to auspice the grant on behalf of another charity. The main requirement here is that the activity that is funded must be aligned with the purposes of the DGR charity. Auspicing is very common, and on the face of it there are very few risks to the philanthropists to use such an arrangement. The main drawback is that the DGR charity might take a fee, in the realm of 5-10% in exchange – a small cost to get big change happening, and that fee is still going to support charitable work.

# SCALE OF INVESTMENT

It is crucial for philanthropists to understand what an appropriate scale for investment is before committing to a specific project. Depending on the project, \$10,000 could either be a significant investment or barely noticeable.

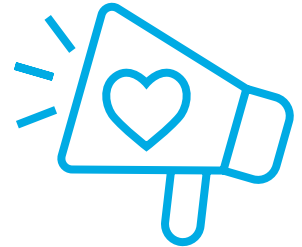
Often the scale of investment required can depend on the scale of the organisation – large institutions with existing funding streams may need significant investments to overcome challenges or launch new projects, whereas startup organisations can often do a lot with smaller amounts of seed funding.

The scale of investment can also vary depending on the issue, and the difficulty of creating progress. Money spent must be proportionate to the organisation's capacity to shift policies that until now have been intractable. **The more intractable the issue, the more money it's going to take to shift.**

**If your capacity to give is smaller, you can have the most impact by investing in early stage organisations** (to start a snowball effect). If you want to invest in larger projects – such as campaigns, narrative shifting research, mobilising new constituencies – **consider pooling your funds** with other donors and working together (for example: Manifera or Groundswell).

Amount	Impact for a startup or small organisation (budget <\$1M)	Impact for a medium – large organisation (budget >\$1M)
\$10K	Initial seed funding, capacity to hire a part-time campaigner for 3 days a week for 3 months and enough leverage to get other donors across the line.	A specific tactic (such as targeted advertising project, campaign minisite or producing a powerful video).
\$100K	Capacity to employ a full-time senior staff member (such as the founder and national director).	Funding a senior campaigning role to expand capacity or backing a specific campaign budget including messaging, content production or advertising.
\$1M	<i>Unlikely to be required.</i>	Systemic intervention, multi-year funding for long-term campaigns, covering several campaign staff on full-time salaries, campaign activities, content creation and message research.

*“Arguably you’re not pulling the levers you can if you only give a small amount. There are strong arguments to say we need to make larger upfront investments... large enough to properly test and experiment with something to get evidence as to whether it’s working. [You] shouldn’t be scared of going too big. It’s better to invest in something in a robust way than to expect something within the advocacy and organising space to just happen.”*

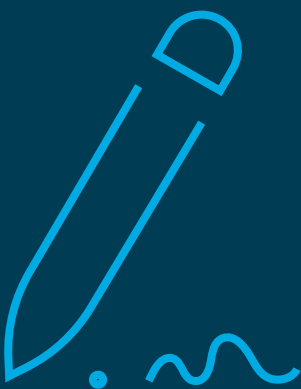


# Organising yourself

While every philanthropist can invest in advocacy, truly strategic investments require specific capacities. Some philanthropists have made large-scale bets on advocacy with little results to show – this may have been poor luck, but it may also reflect capacity and processes that are out of alignment with the rhythm and needs of the social change world.

Key areas of capacity to strengthen include your expertise, your access to quality projects to fund, the process by which you make decisions, the way you leverage your funding, and the relationship you build with your grantees.

Philanthropists will often (accurately) criticise nonprofits for ‘not knowing how to relate to funders’. It’s true, often they don’t. On the other hand, while your grantees are your primary stakeholders through which you achieve your mission, your grantees themselves have a much broader range of stakeholders they have to consider and they may be real experts in other types of relationships. To attract quality projects, it may be incumbent on you to adapt your processes to work for prospective grantees.



# STRENGTHENING YOUR EXPERTISE

The more you know about advocacy, social change and the landscape in Australia, the more you're likely to be able to make strategic bets.

- **Staff** – If your foundation is staffed, hire someone with a civil society or campaigning background. This is surprisingly rarely done in Australia compared with the U.S. or UK. Avoid hiring from academia, business, government or the arts and expect them to be an expert in advocacy work. Consider backgrounds in human rights and environmental organisations and even trade unions.
- **Board** – If your foundation is investing in systems change, likewise make sure there is a systems change specialist on the board, or two. Have in-depth discussions about values, risk appetite and theory of change before adding them.
- **Global knowledge** – Explore the world of similar philanthropies overseas. Australia has a small and insular philanthropic sector, but analysing the website and grant-listings of major philanthropies in the U.S. that work on similar issues can give remarkable insights into what's current, decision making criteria and provide reassurance that you're not 'out on a limb'.



*“It’s a big piece of work understanding your role, what’s needed, who’s important and where your investment can make a difference. You’ll [want to] collaborate with other philanthropists, fund a peak body to get up to speed, research and really do your homework.”*

– PHILANTHROPY PERSPECTIVE

# THE DEAL FLOW

Access to deal flow is ‘currency’ in the for-profit investment world – that is, the number and quality of opportunities that pass the desk of the investor. The higher quality the investment opportunities available, the more choosy the investor can be, and the higher return they can expect. The same is certainly true in the nonprofit world – with the exception that the higher dividend is more typically in terms of impact.

Therefore, when choosing to invest in advocacy, you should consider strategies to increase the number of *high quality* projects (rather than just the sheer number) that are coming across your desk.

## Strategies to improve the quality of deal flow include:

- **Build out your key relationships** across the spaces you care about. Consider making small scale donations to a range of key organisations that build a sense of trust and heighten their engagement with you – and the likelihood they’ll share insider info or advance notice on exciting projects.
- **Connect with organisations that regularly play ‘philanthropic intermediary’** or capacity-building roles and therefore have an insider take on the strategy and strengths of a sector or even across multiple issues. Beyond Australian Progress, examples of well-connected organisations include The Australia Institute and the Sunrise Project (in the climate space).
- **An often overlooked source of intelligence of current or upcoming projects are research, media consultancies and creative agencies** that work across the space. Some of Australia’s most prominent advocacy funders lean on such agencies and their principals as trusted sources of counsel. Examples here include Essential, Common Cause, Purpose Asia Pacific and Reveille.
- **Be clear with those you trust that you are always open** to being sent proposals, and that you want them to make suggestions and refer others with high quality projects, and that this will build your relationship not damage it. You’d be surprised how many times grantees will not tell you about great new projects because you’ve already funded this year, or because they are worried if they refer others you’ll stop funding them.
- **Build your relationships with, and participation in, civil society peak bodies** or networks, who often have a strong map of the landscape – and actively ask them what they think are the most exciting projects. Often peak bodies have already worked within their sectors to identify and build engagement around key priorities based on their member’s insights.

- **Run your own open grant round** at least twice each year, actively soliciting new ideas. Open grant rounds are particularly helpful for finding and sorting new projects and organisations. Note – we recommend avoiding open grant rounds for those partners you have an existing relationship with – it’s best to have a more open discussion about your individual objectives and find common purpose around projects.
  - Be transparent around the total amount of money you’re giving away, the likely scale of each individual grant, the issue focus or other priorities you have, and what you absolutely won’t fund.
  - Have a multi-stage process, where grantees are only expected to complete a very short form or expression of interest as the first step. Regardless of how clear you are about what you’re looking for, the reality is that more than 50% of open grant-round applicants tend to be clearly ‘irrelevant’. You’ll save them the time filling in longer forms and detailed budgets (and dealing with the uncertainty waiting for you to decide), but likewise you’ll save the time reading through lengthy details. If a project can’t grab your attention with 200 words, it’s unlikely going to be able to with 2000.
- **Join the increasing number of donor networks** that are emerging in Australia, which bring together philanthropists keen to build their knowledge, make collective decisions, and even pool their resources to be able to invest at a larger scale.
  - Mannifera
  - Philanthropy Australia and their dedicated funder networks
  - GiveOUT LGBTIQ+ Giving Circle
  - Groundswell Climate Giving Circle
- **Follow the work of other philanthropic investors** who appear to have a good deal flow, based on their prominence (such as Myer Foundation or Equity Trustees) or particular expertise in the advocacy and systems change space (such as the Reichstein Foundation).



*“I’d always say fund with other people – don’t do it on your own. Share their ways of measuring, their understanding of what changemaking looks like... We want to be able to share that risk with other people. [It’s] an informed boldness, not a stupid boldness.”*

– PHILANTHROPY PERSPECTIVE

*“In [example], the funders were often at odds with each other, they didn’t line up their processes or timelines; they tended to operate in a competition model rather than a collaboration model on the idea that one would do it better than the others.”*

– PHILANTHROPY PERSPECTIVE





# THE PROCESS OF GRANTMAKING

Once you've got a lot of options in front of you, how do you decide to give a gift? Considerations include how frequently you decide, what detailed information you expect from grantees, and how you conduct due diligence.

## The cadence of grant-making

- **Create frequent opportunities** – Have several grant rounds, ideally multiple per year, to ensure you don't miss important opportunities as they arise.
- **Have flexibility outside formal rounds** – Create headspace and reserve some funds to be responsive and invest more spontaneously and rapidly.
- **Streamline decision making** – For impact in big moments, you'll want to confirm grants within a week of receiving an application. Consider setting, with any joint decision makers, a 'go to' amount of money (whether \$2,000, \$5,000 or \$10,000) that you feel comfortable giving away quickly. As a rule of thumb, we suggest allocating 5-10% of your overall giving to rapid response.
- **Fund upfront** – While flexibility is important, to reduce the need for additional rapid response investments, you should upfront fund the organisations you trust. Make sure they have untied resources which they can decide to allocate themselves. This way they won't need to make urgent requests outside standard processes, chasing funds instead of doing urgent work. This will benefit both you and the grantee significantly.

## What information you expect from grantees:

- **Be clear about your priorities** – While being open to a broad range of approaches and theories of change, be as clear as possible about what you will *not* fund to weed out the projects that won't fit.
- **Ask for short EOIs** – However clear you are, many applications will still be irrelevant, so requesting a short expression of interest (EOI) instead of a detailed proposal will allow you to scan them quickly, and then ask only those who qualify to submit more details – saving time for you and the applicant. Create strict word limits on EOIs (such as 300 words in total), and allow people to include web links to demonstrate their experience.
- **Avoid lengthy bespoke forms** – Rather than requiring strong prospective applicants to complete a complex, bespoke application form, have flexibility to receive proposals in a format chosen by the applicant. Remember, they are likely having to apply to several funders in order to find one that will give, and filling in forms takes away from their impact. You *should* follow-up with specific questions that you don't believe they have addressed.
- **Share the workload** – If you ultimately need information on 'shortlisted' or 'recommended' groups in a standardised format for comparison (such as to take to a board or family decision process), consider doing that work collaboratively with the potential grantee. This will demonstrate that you're just as invested in them getting the grant as they are.
- **Ask about capacity building** – Include a section about how the organisation intends to use the project or funds to build their own capacity and/or power of their movement to drive change. How will it help them be better positioned for the future?
- **Collaborate with others** – Get together with the other donors who fund similar work to you and see if you can develop a shared application form or even a shared pool of funds to streamline granting.

**Due diligence and managing risk:**

- **Managing financial risk** – Groups that are very small have financial and execution risks. To manage this, schedule payment installments over a period of time, rather than a single upfront payment. At the same time, one of the biggest challenges they face may be cash flow – and one of the most helpful things you can do is provide them with some cash.
- **Personnel risks** – Remember that people leaving an initiative you fund is not inherently a disaster, people leave roles all the time. The bigger question is whether the organisation has a depth of talent to carry forward, and how attractive it is for other talented people to join. It's better for everyone to consider upfront what would happen if individuals depart.
- **Legal risks** – While compliance risks in advocacy work – especially for donors – are often overestimated, you should obtain your own legal advice. If you run a foundation, it is important to ensure funds are being used for the purpose intended; and if your trust has received a tax deduction (such as a PAF) that you are giving only to other DGR entities (and projects they auspice). In extremely rare situations, if your advocacy is especially pointy (for example, you are clearly advocating against a particular political candidate during an election) the work may be considered 'third party campaigning', and both you and the grantee may also need to disclose the funding to a state or federal election commission. In some cases, certain categories of donors are prohibited from such donations – such as property developers in NSW. Transparency in our democracy is a good thing, and navigating this shouldn't dissuade you from making the gift – if necessary just ask your grantee to share any administrative work, or engage an electoral law specialist.
- **Reputational risks** – Consider whether your funding of the project poses a risk to your personal reputation, or perhaps just as likely, to the reputation of the grantee. These risks can be mitigated, such as by asking grantees to minimise their acknowledgement of your support, or by making the donation through a charitable foundation or intermediary. You may want to have an upfront conversation with grantees about not just past activities and profile, but likely developments over the course of the grant's life. Make a clear decision on the transparency of your funding, how it is advertised by both you and the grantee, and the positive story you want to tell about your support.



*"Trustees of our foundation typically have corporate experience, including big financial bets. But they come into the [foundation board] and lose all appetite for risk – they're terrified especially of reputational risk, especially to their personal brand."*

– PHILANTHROPY PERSPECTIVE

*"We [find it useful] sometimes to change the terminology – rather than 'advocacy', perhaps 'championing voices', or 'unlocking all of the tools to amplify impact.'"*

– PHILANTHROPY PERSPECTIVE



*"When it comes to risks, when you want to make a stand and make an intervention, if you're on the side of having capital, you're largely protected from these things. That said many [philanthropies] are not used to scrutiny and therefore hyper sensitive."*

– PHILANTHROPY PERSPECTIVE

**Helping raise additional funds:**

- **Managing financial risk** – Consider the power of your network – Your network may be even more valuable than your money. Philanthropists are major influencers on other philanthropists. Make time for introductions to other donors, and if possible attend meetings with your grantees to help them seal the deal. Helping diversify an organisation's funding also means they will be less reliant on your continued giving, and will give them a growing pipeline of support.
- **Early money is like yeast, it helps raise the dough** – Investing early in projects can help them be more attractive to other funders. Bonus – you'll look forward-thinking!
- **Match funding** – You might consider placing a match funding requirement on your gift. Match funding can be useful at getting other donors on board (and you might also find value in matching others). However, be reasonable and careful about match funding requirements. Is it truly likely a match can be found? Does a project have to be fully funded before you give the funds, or is there an earlier or easier milestone that could be met? Avoid more than single matching per project.
- **Have a specific target for additional fundraising** – Assume it takes six months to raise large amounts of money, so set realistic targets and expectations.
- **Use moments** – Moments are a great time to engage in additional fundraising pushes. You may plan to raise a certain amount across the year, but jumping on specific moments as they emerge is more likely to create surges in fundraising than steady growth. Elections, major media moments, shifts in the policy landscape and the release of new reports and research may all increase interest in giving to the project.

## Evaluation

- **Create an open dialogue with grantees** – Have an open dialogue with groups and accept that they might have execution or impact setbacks in their work. This space is very hard, tiring and emotional, and there needs to be a higher degree of support. When groups face challenges, lean in rather than lean out – ask questions like: *‘what’s wrong, how can I help, what have you learnt’*.
- **Create common reporting frameworks** – Agree to use common reporting frameworks for projects with other donors.
- **Rely on expertise** – To do serious evaluation in the advocacy space, you need evaluators who deeply understand advocacy and can peel back the onion and figure out what is really going on. There are likely to be many varied perspectives that reflect the window, political interest or unconscious bias of anyone providing a ‘viewpoint’ whether it be political decision makers (who are rare to accept a public campaign influenced their views), the media, or ‘competitor’ organisations. Finding ‘truth’ often requires subjective judgment based on expertise.
- **Evaluate yourselves as well** – Many donors (even large institutional ones) hold their grantees to very high levels of accountability that they wouldn’t consider for themselves, for example extensive reporting and record keeping, delivery in the face of external challenges, mobilisation of resources, guaranteed impact, as well as targets such as racial diversity on boards and women in leadership. As a funder, you should think that you also have some shared accountability with groups. Consider ways to evaluate your work and communicate your learning to your grantees, and ask them for their views on ways you could improve.

*“Don’t expect when you’re making a grant for advocacy, that the organisation you’re making the grant to is going to come to you with a perfectly rigorous monitoring and evaluation framework – they won’t have that. Have rigor but not unrealistic expectations. Say, ‘We will work with you to develop a monitoring and evaluation framework; we’ll fund you to do this!’”*



– **SOCIAL CHANGE PERSPECTIVE**



*“One of the challenges is that every single funder [supporting the one project] has a different framework – they need to have a single evaluation framework!”*

– **PHILANTHROPY PERSPECTIVE**

# THE RELATIONSHIP WITH THE GRANTEE

**Think about what you value in your relationships, and how you're bringing these qualities to your philanthropy.** The things that matter in relationships with advocacy grantees are similar to any relationship – trust, mutual respect, open communication, commitment over time, support in the difficult times, values alignment, ability to find compromise, reducing power imbalances, and more.

- Find ways to indicate that you trust your grantees, such as providing them with core funds.
- Maintain regular communications with prospective, current and past grantees, don't just wait for them to reach out. At the same time, let them know your own communications preference. Is it a monthly email, a photo slideshow, a three-monthly call, a six monthly email, or simply a text message when something big happens.
- Talk about your values and what you care about – grantees will often make incorrect assumptions, and feel shy about probing when it comes to personal views.
- Find a balance between investing in new projects and maintaining a commitment to existing causes or individual changemakers.

While a strong relationship is vital, always measure the success of a project by its real world impact, and remember that the level of donor stewardship (the attention a grantee devotes to you) may not correlate with their effectiveness as changemakers. Other considerations will include:

- Their experience with the world of philanthropy. Some groups – especially grassroots ones – may be inexperienced and even awkward due to power imbalances, nervousness (meeting you is sort of like a job interview – a lot might be at stake), and cultural or class differences.
- How big they are, what percentage of funding your contribution reflects and how tight their budget is, and therefore how important your funding is to their financial position.
- How much they spend on fundraising and their capacity to engage with you frequently. Bigger nonprofits are likely to have dedicated staff either fronting the relationship with you, or doing work behind the scenes, whereas in smaller ones the leader may only be able to spend a tiny fraction of time building new philanthropic relationships.

Remember that many NGOs also have imposter syndrome. They feel like they should be doing a lot with a little, so you often need to make sure they ask for the right amount of money, accurately reflect their own impact, and tell a powerful story. They will likely require your support and encouragement, as well as funding. They may struggle with making 'asks', especially for core funding. They are often not as used to the concepts of investment that exist in the for-profit world. They may feel that asking for money comes across as begging, so you may need to help them see that core unrestricted donations are more important to you than short-term projects, as it is almost undoubtedly more valuable to them.

# Appendix: What does it all cost?

Are they asking for too much or too little?

Sometimes it's hard to know, looking at a proposal, if the budget stacks up?

To help, we've pulled together a 'menu' highlighting a spectrum of costs that are regularly incurred in advocacy work.



# WHAT DOES IT COST?

Below we describe the costs required to do this work properly and well, but not over-invest. Lower costs are possible in all areas, but generally you should assume a higher risk of not meeting impact targets.

Similarly, higher costs are possible – this is often the case if expenses are incurred at short notice (in order to take advantage of a window of opportunity). Higher costs may also indicate a lack of experience in estimating costs. It is also possible to over-invest in particular tactics, generating a lower return on investment.

## Staffing

Staff (all include super)	Indicative cost
CEO of \$600,000 advocacy org	\$120-160k
CEO of \$4 million+ advocacy org	\$190-230k+
Senior staff member on a large campaign (10+ years experience) <ul style="list-style-type: none"> <li>• Government relations manager</li> <li>• Coordinator of a coalition</li> <li>• Director of communications</li> <li>• Coalition coordinator</li> </ul>	\$160k
Expert level staffer with limited management responsibilities (6+ years of experience) <ul style="list-style-type: none"> <li>• Digital campaigner</li> <li>• Lead community organiser</li> <li>• Policy expert</li> </ul>	\$110-130k
Mid-level staffer – generalist or specialist (3-6 years of experience)	\$100-120k
Junior level staffer (2 years of experience) <ul style="list-style-type: none"> <li>• Research assistant</li> <li>• Junior digital or media staff member</li> <li>• Local organiser</li> </ul>	\$75-90k

## Tactics and other direct expenses

Sample activities	Low End	High End
<b>Campaign or advocacy website</b>	<p>\$2,000+</p> <p>Short-term use, likely a moment in a campaign.</p> <p>Links to other sites for key purposes.</p>	<p>\$30,000</p> <p>Expected to last 2+ years.</p> <p>Holds majority of campaign content.</p>
<b>Social media advertising</b>	<p>\$5,000+</p> <p>Small advertising campaign designed to raise awareness of a campaign amongst a niche group.</p> <p>Could also be used to test messages, or designed to generate fundraising return (donations).</p>	<p>\$100,000+</p> <p>Large targeted advertising campaign designed to achieve substantial persuasion targets.</p>
<b>TV advertising</b>	<p>\$5,000</p> <p>A small number of ads shown on Sky News or <i>Meet the Press</i> in Canberra, largely designed to spark further earned media.</p> <p>(Production budget is also likely \$7,500 - \$15,000 including FreeTV approval process).</p>	<p>\$3-7 million</p> <p>The type of ad budget required to generate national cut through (e.g. sizable number of people will have seen the ad several times) with a mainstream audience.</p> <p>In some States (such as Tasmania) it's much cheaper to reach critical mass.</p>
<b>Outdoor advertising (e.g. billboards)</b>	<p>\$2,500</p> <p>Per billboard, low profile site.</p>	<p>\$20,000 - \$50,000</p> <p>Per billboard, high profile site.</p> <p>Discounts available for last-minute or bulk purchases.</p>
<b>Direct mail (letter to households)</b>	<p>Rule of thumb - \$1.50 per letter per household when delivered by Australia Post, including print production.</p>	
<b>Professional video of a personal story</b>	<p>\$2,500</p> <p>May involve shooting in one location or a studio.</p>	<p>\$7,500</p> <p>May involve shooting in multiple locations or interviews with several people.</p>



Sample activities	Low End	High End
<b>Shareable Facebook video</b>	\$1000 - \$2,000 Could be quite easily made using a video editing tool using existing footage or still photography.	\$5,000 - \$25,000 Would have more filmic qualities. Higher cost only worthwhile if combined with a strong distribution budget or released by an organisation with significant existing channels.
<b>Campaign CRM system</b>	\$1,000 a month for an off-the-shelf tool such as Nationbuilder or Action Network. Cost is often based on number of contacts.	\$5,000+ a month for a large organisation; when at scale approximately 1/10th of time of staff will involve data management (either 1 out of 10 staff being data focused; or spread throughout team)
<b>Graphic design of a report</b>	\$100 per page	\$400 per page
<b>Polling</b>	\$2,000 for per question included in a national telephone 'omnibus' poll by a reputed market research company (your question will be mixed in with a range of other commercial and/or political questions). \$800 for a question in a Robocall survey.	\$20,000 for a statistically accurate dedicated telephone poll of a local electorate or a niche population group.
<b>Focus groups</b>	\$4750 per focus group at the low end.	Up to \$7000 per focus group. Variables include location outside Sydney and Melbourne, room type (if there is a special viewing room), recording, level of analysis, reputation of the consultant
<b>Message dial testing or extended online research / testing</b>	\$20,000 - \$35,000 Consideration should be given to the level of reporting and analysis provided as well as the consultation/expertise that goes into shaping the survey.	

Sample activities	Low End	High End
<b>Venue hire for a large event or forum</b>	\$1000 for a 100 person space for three hours; assumes limited AV requirements.	\$6,000 - \$8,000 for use of a Town Hall-type space for 1 day. Sometimes nonprofits can access discounts but this cannot be assumed, especially at short notice. AV may be a considerable additional cost.
<b>Workshop venue hire (25-50 people)</b>	\$100 / hour	\$300 / hour
<b>Retreat, planning or training venue (e.g. 25 people for 2 nights and 2 days)</b>	\$350 / person all inclusive including twin/multi-share accommodation	\$500-600 / person all inclusive including single accommodation
<b>Catering</b>	\$25 / lunch \$55 / day catering \$50-70 dinner function	Double these costs for higher quality, or at a most costly venue (such as for a major donor fundraising event).
<b>Corflute printing and distribution</b>	\$5 printing per corflute*; \$15 distribution per corflute if using a courier service. Factor in storage arrangements and opportunity cost of volunteer time if not using a commercial fulfilment arrangement.  *A corflute is a weatherproof sign, commonly used in election campaigns for candidate and brand promotion.	
<b>Campaign t-shirts</b>	\$12 each for higher purchase quantities (say 300+). Assumes Australian-made and ethical sourcing.	\$15-20 - may indicate lower quantities purchased, or multiple colour printing.
<b>Holding a rally or large public event</b>	\$500 for permits, megaphone, small stage, basic banner and signage.	\$25,000+ for sound system, staging, marshalling, printing of banners, travel, fee for Welcome to Country and promotion.
<b>Community organising in an electorate or other defined geography</b>	\$30,000 per electorate. Mostly staff time - would need to leverage an existing base of people.	\$300,000+ per electorate. Reflects 1-2 organisers over a 12 month period; local office, range of expenses as above; may be building community from smaller-base.

