

September 2019

*The Colorado Health Foundation*

# Developing a Strong Philanthropic Policy Advocacy Function

Spotting and Managing Inherent  
Tensions to Increase Impact



# ORSIMPACT

Missions Accomplished

1100 Olive Way, Suite 1350 | Seattle, WA

206-728-0474 | [ors@orsimpact.com](mailto:ors@orsimpact.com)



# In This Brief

Introduction.....	1
What are polarities?.....	3
Polarities Central to Integrating a Policy Function.....	5
1. Being planful and nimble.....	5
2. Being a supportive partner and a visible leader.....	11
3. Maintaining political neutrality and being provocative when needed.....	16
Conclusion.....	19
Appendix: The Colorado Health Foundation’s Focus Areas.....	A-19



## Introduction

In late 2005, The Colorado Health Foundation (the Foundation) Board of Directors adopted a vision that Colorado would be the healthiest state in the nation. There was recognition that in order to maximize the Foundation's impact, engaging in public policy advocacy work in addition to traditional grantmaking would be valuable. In its first strategic plan, completed in late 2005, the Board asserted that public policy is an important arena for foundation action and represents an effective way to advance its goals.<sup>1</sup> The Foundation adopted its current strategic framework in 2016, which centers on equity and an explicit intent to ensure health is in reach for all Coloradans. (See Appendix.)

In the more than a dozen years since hiring its first policy staff, changes in the Foundation's strategy, culture, and structure have both influenced and been influenced by the simultaneous evolution of its policy function. One of the biggest structural changes relevant to how a policy function contributes to the Foundation's impact on its mission was the Foundation's unusual decision to change its tax status from a 501(c)(3) public charity to a private foundation following the sale of its ownership interest in a health-related joint venture in 2011.<sup>2</sup> During this transition, the Board remained committed to policy advocacy, though the tax status change meant operating under new rules and sparked consideration about the Foundation's future policy advocacy approaches and the relationship of policy advocacy to the Foundation's philanthropic, communications, and operational functions.

The Foundation began operating as a private foundation in 2016. The primary impact on its public policy activities was in the area of lobbying. Unlike 501(c)(3) public charities, private foundations cannot legally engage in any activity classified as direct lobbying (i.e., communication with a legislator or legislative staff member that takes a position on specific legislation) or grassroots lobbying (communication with the public that refers to specific legislation, reflects a view of that legislation, and contains a call to action). Nevertheless, organizations with private foundation tax status can engage in a wide range of permissible advocacy activities. These include educating policymakers through nonpartisan research and analysis, convening decision makers, influencing regulatory changes (versus legislation), and providing general support grants to nonprofit organizations that lobby.

---

<sup>1</sup> See: The Colorado Health Foundation. (2015). "Overview and History of Policy and Advocacy at the Colorado Health Foundation."

<sup>2</sup> <https://www.coloradohealth.org/reports/creating-healthier-colorado>.



Throughout leadership and strategic transitions in the organization, the Foundation's leaders have continued to emphasize public policy as essential to its mission, and policy advocacy has remained a core function. The Foundation now supports a continuum of advocacy efforts, integrated across the Foundation's departments, aimed at advancing public policies that foster health equity as well as amplifying the voices of Coloradans who have not historically been included in decision-making processes.

A dedicated policy advocacy function is somewhat rare among foundations; many foundations that aim to address public policy do so solely through grantmaking, i.e., supporting organizations engaged in advocacy. Across its current strategic priority areas, the Foundation seeks to use its own point of view and voice as a means to influence policy while also supporting other nonprofit organizations that advocate to advance health equity. This both/and approach harnesses the power of a philanthropic policy function, and there is evidence that the Foundation's policy advocacy efforts have contributed to clear policy gains, amplifying impacts that have advanced the Foundation's strategic intent and mission.<sup>3,4</sup> Drawing on the Foundation's experience, this brief describes the development and evolution of its policy function over time and explores the question: How can a foundation successfully integrate and implement both program-focused philanthropy and policy functions to advance its mission?

How can a foundation successfully integrate and implement both program-focused philanthropy and policy functions to advance its mission?

To develop the brief, ORS Impact (ORS) reviewed internal documents, engaged in discussions with staff, and interviewed several current and former staff. Findings that emerged from those efforts surfaced three distinct polarities—that is, inherent and persistent tensions within the Foundation's policy advocacy efforts which, if not recognized and managed, can impede progress toward goals. ORS discussed these polarities with Foundation staff to better understand specific ways in which each has manifested within the Foundation's policy efforts over time, to surface specific signals that have helped staff recognize how polarities may be affecting their work, and to understand how foundation staff thought about developing strategies for managing them. The examples and related insights captured in this brief help to illustrate how the Foundation has experienced and, over time, become better able to navigate these inherent polarities. By

<sup>3</sup> See: The Colorado Health Foundation (2015). "Overview and History of Policy and Advocacy at the Colorado Health Foundation."

<sup>4</sup> Policy-related influence and successes are detailed in several past impact reports that impact across CHF's strategic areas of investment: *Primary Care* (2017); *Creating Healthy Schools* (2017); and *Creating Healthy Communities* (2018).



describing the Foundation’s policy advocacy efforts in this way, we hope to spark thinking for other foundations engaged in actual or potential future policy-focused efforts about how they may deal with similar tensions inherent in their own work.

## What are polarities?

Polarities are ongoing, unavoidable tensions that arise in systems contexts. Polarities reflect issues, situations, or dilemmas that encompass two or more interdependent responses, both of which are necessary to attain the desired impact—that is, change among people, or within programs, practices, partnerships, policies, or the distribution of resources. Because they represent problems that are unsolvable, polarities instead must be *managed*.<sup>5</sup> Based on our experience working with foundations around policy advocacy, we hypothesize that the kinds of polarities described in this brief may be common to foundations implementing (or seeking to implement) both philanthropy and policy functions. We further hypothesize that clear recognition and successful management of polarities is important to foundations’ successful implementation of both functions and, ultimately, the advancement of desired goals.

Clear recognition and successful management of polarities is important to foundations’ successful implementation of both philanthropy and policy functions and, ultimately, the advancement of desired goals.

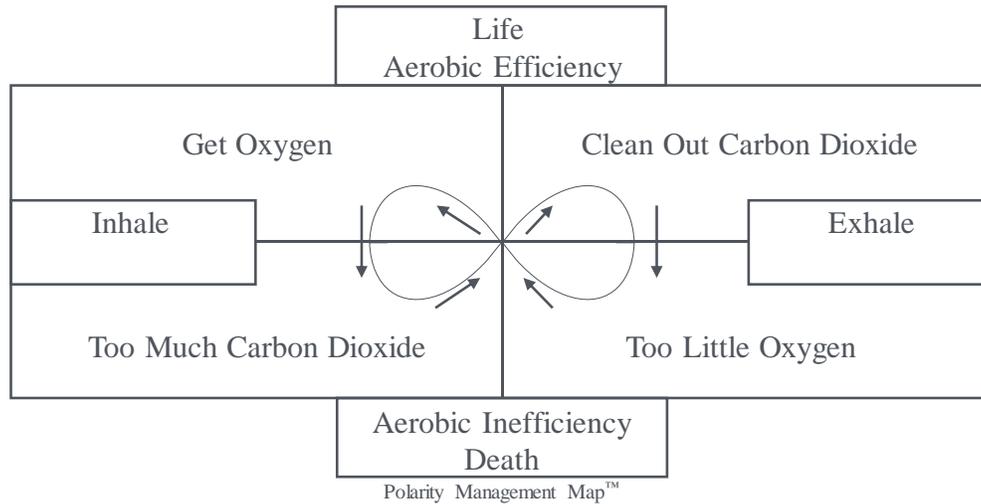
In his primer on polarity management, Barry Johnson introduced a map as a mechanism for exploring polarities (see Figure 1 on the following page). In a polarity map, the left and right poles are interdependent correct responses to the issue or dilemma being portrayed, and the very top and bottom boxes represent “success” and “failure” with respect to the larger purpose or goal being sought. Within the polarity map, the top two quarters reflect what happens when application of the two interdependent responses is managed well (i.e., “upsides” are realized), while the two bottom quarters reflect what happens when interdependent responses are not well managed (i.e., “downsides” are experienced). The central circular arrow pattern shows how, if downsides are recognized or apparent, adjustments can occur that would lead to realization of upsides.

---

<sup>5</sup> This section draws on the work of Barry Johnson. See Johnson, Barry. (1998). *Polarity Management: A Summary Introduction*.



Figure 1 | Polarity Map<sup>6</sup>



In Johnson’s basic example, the issue portrayed in the polarity map is breathing. The two poles, inhale and exhale, are the interdependent necessary actions needed to realize success—that is, aerobic efficiency necessary to sustain life. To achieve success and avoid failure, in this case aerobic inefficiency/death, one must consistently inhale and exhale. Thus, there is no *singular* correct response or action to ensure aerobic efficiency; neither inhaling nor exhaling is, on its own, enough. The top quarters of the map describe the upsides of managing the polarity well—for example, through balanced inhalation and exhalation, it’s possible to get enough oxygen and clean out carbon dioxide, both of which are necessary to achieving the goal. The bottom quarters of the map show downsides associated with not managing the polarity well—for example, if there is not enough inhalation, one holds too much carbon dioxide, and if there is not enough exhalation, one gets too little oxygen—either or both of which would impede the goal of staying alive.

In an organizational context, polarities are well managed when two interdependent responses associated with an issue, situation, or dilemma are clearly recognized and can be *effectively balanced*. That is, when an organization experiences a certain issue or dilemma, there is attention to how and when certain responses or actions need to happen either more or less in order to advance a goal. If these actions are balanced, the organization can successfully navigate the tension and maximize realization of upsides while mitigating or minimizing downsides.

<sup>6</sup> Ibid.



# Polarities Central to Integrating a Policy Function

The Foundation's journey to successfully integrate a productive policy function has involved navigating several polarities, three of which are

1. Being planful and nimble
2. Being a supportive partner and a visible leader
3. Maintaining political neutrality and being provocative when needed

For each of these polarities, *success* equates to building and maintaining over time the Foundation's capacity to influence public policy decisions and deploying that capacity to create positive impacts on the Foundation's focus areas, priorities, and mission in varying political contexts. Failure equates to reduced capacity for the Foundation to influence public policy decisions and little or no positive impact on focus areas or priorities.

In the following sections, each of the three polarities is described in detail. We explore the specific signals that provided evidence staff were getting it right or needed to adjust course and how Foundation staff responded to those signals to manage the polarity over time. Where possible, specific illustrative examples are provided to bring each polarity and its associated tensions into richer focus. While the concept and language around polarities is relatively new to the Foundation, staff noted that the tensions described within each polarity example have been consistently present since their earliest work in the policy advocacy space.

## 1. Being planful and nimble

*Having structured processes and a proactive, planned agenda while remaining flexible to respond appropriately to changing circumstances*

For the Foundation, one of the tensions inherent in successfully producing impact through its policy function has been instituting structured decision-making processes to develop a proactive, planned policy agenda while remaining nimble enough to respond to changing external



conditions and emergent opportunities or threats when necessary. Foundation policy staff acknowledged that managing challenges associated with this tension has been an important aspect of their policy advocacy journey story.

As is true for many foundations, the Foundation's organizational norms have traditionally favored clear plans and deliberate approval processes that provide a framework for accountability. The structure provided by a proactive and defined policy agenda and a formal process for approving policy strategy helps to clarify boundaries for the Foundation's organizational efforts, reassuring leaders and the Board that Foundation staff will not veer off course vis-à-vis the mission. The policy agenda also provides Board members with a documented plan against which progress can be tracked over time. In addition, these structured processes guide resource allocation and promote awareness about priorities, which in turn helps to foster alignment across internal departments as well as with external partners.

Yet in a dynamic policy and political environment, unexpected and unpredicted changes are the norm. Such changes often have significant implications for a foundation's policy advocacy efforts: for example, the urgency with which a response is needed; the degree and nature of coordination with partners required; or the pace, breadth, or likelihood of progress toward an identified goal. Given that policy advocacy will inevitably require staff to quickly respond to unexpected changes in the external landscape or opportunity windows, it is crucial that organizational processes and norms allow some degree of flexibility. As one Foundation staff member described, *"Being responsive and reactive [is necessary to good policy advocacy, but] can be counterintuitive to a foundation that is more accustomed to deliberate processes."*

Given that policy advocacy will inevitably require staff to quickly respond to unexpected changes in the external landscape or opportunity windows, it is crucial that organizational processes and norms allow some degree of flexibility.

The Foundation's policy staff reflected on some of the ways that this polarity manifested. Shortly after the Foundation hired its first policy staff in 2006, a public policy committee (PPC) of its Board was established. This formal governance structure was created to give the Board and Foundation leaders more visibility into policy advocacy strategy and activities since it was a new area of work. There was an explicit intent that the PPC's role was to provide oversight over strategy and assure legal compliance in tactical execution of the organization's advocacy work—for example, the PPC would exercise some degree of control over the direction of policy advocacy via formal approval of decisions or actions.



At the time, much of the Foundation’s effort involved direct lobbying for or against specific ballot measures or legislation proposed in Colorado’s state legislature on issues related to the Foundation’s strategic focus areas. When a policy opportunity or decision arose that had not been explicitly identified or approved, expectations were that policy staff would prepare a formal motion for the PPC’s consideration. The PPC would then review and vote to determine the Foundation’s position on a specific piece of legislation.

According to policy staff, the structured processes for engaging with the PPC regarding the policy strategy and agenda had some upsides. Board members who had no prior experience with advocacy were able to develop a better understanding of the nature of this work, including how the surrounding political context could affect it. In addition, discussion with the PPC allowed policy staff to educate the Board regarding policy debates and solutions aligned with the Foundation’s goals.

However, structured plans and approval processes at this granular level also proved to have some significant downsides. Specifically, having the PPC focus at such a granular level had significant opportunity costs for both staff and the Board. Under this governance structure, staff would spend a lot of time preparing for committee meetings, time they could have devoted to alignment and communication with internal and external partners, and the PPC often stayed focused on tactical execution to the neglect of big-picture strategy.

In addition, the PPC approval process was often much too slow to keep pace with rapid developments in the state legislature. When the PPC had to weigh in on every bill, position, or decision, policy staff were unable to respond effectively to rapidly changing conditions. For example, if a bill the Foundation had previously supported was substantively amended during the legislative process, preparing a revised response required going back to the PPC for approval—a potentially lengthy and cumbersome process when the committee only met monthly. Policy staff described working on dozens of issues, with numerous decision points arising on a daily (sometimes hourly) basis, and they found themselves missing important opportunities to weigh in on policy proposals when they had to delay action until after a monthly PPC meeting.

The structured approval process also hamstrung the Foundation’s ability to offer timely support to partners’ priorities. For example, a group of partners came to the Foundation in relation to a ballot measure proposing a specific solution to reform funding mechanisms for K–12 education. The measure would have increased dedicated funding for education and changed how it would be distributed among communities in the state. Partners requested that the Foundation contribute both funding and advocacy support for a campaign in support of this ballot measure. However, when policy staff brought this proposal to the PPC, the committee engaged in a long,

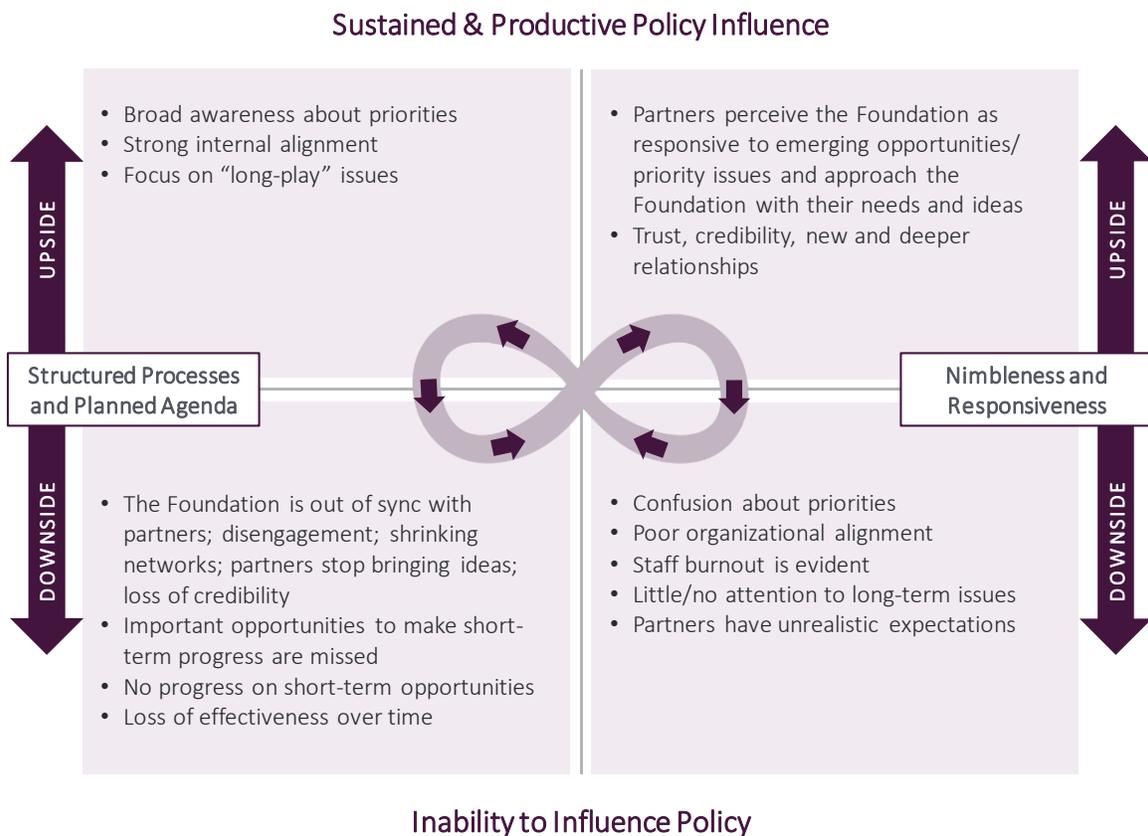


multi-month discussion before ultimately agreeing to support the measure. By that time, policy staff recounted the following:

*“It was really too late in the game [to influence the outcome]; we were too slow, and the ballot measure failed miserably. While the measure may have failed anyway, if we could have engaged in the work earlier . . . we could have helped to shape messaging and educate potential champions and decision makers. I don’t know if that would have made a difference, but I think it could have. Engaging later is materially different [and often less meaningful and impactful] than engaging earlier.”*

Figure 2 describes upsides and downsides associated with this polarity, including specific signals that have been observed or experienced by Foundation staff, albeit with varying levels of intensity and duration.

Figure 2 | Structured Processes and Nimbleness to Respond: Signals of Upsides and Downsides





Over time, Foundation staff across departments have become more aware of upside and downside signals and have invested in strategies to better detect and respond to the downside signals using a variety of actions. Some of these have involved structural changes—for example, experimenting with departmental restructuring and a variety of formal mechanisms to encourage cross-departmental interaction and alignment (which staff identified as a key factor for successfully advancing policy goals). Others have involved cultural evolutions—for example, cultivating internal and external relationships characterized by thorough, timely, and honest communications that help staff stay abreast of changing opportunity windows and align and adjust efforts accordingly. As staff reflected, they viewed astute recognition and management of this polarity’s upside and downside signals as important to securing alignment of expectations and functions. It has also helped staff and the Board surface opportunities to evolve the processes that guide the governance and oversight of policy advocacy.

In response to the downsides noted above, Foundation leadership proposed restructuring the policy advocacy governance structure and revising the PPC’s role. Rather than weighing in on every policy proposition, the PPC began to approve an annual policy agenda and agreed that staff would have flexibility to implement that agenda in accord with changing circumstances and their own expertise. This newly conceived governance structure specified criteria by which the Foundation’s policy agenda would be approved by the PPC on an annual basis. Guiding documents explicitly state that *“the annual policy agenda provides the Foundation’s staff with a general roadmap for our policy engagement in the coming year, but it is intended to be flexible in nature,”* thereby acknowledging the value of having both a planned policy agenda and permission for policy staff to redeploy resources and attention if changing circumstances should warrant it.

Policy staff emphasize this balance in their orientation and onboarding of new staff and PPC members. The PPC willingly relinquished some control regarding the specific execution of the policy team’s work, though it continues to engage in discussion and provide feedback on emergent or unanticipated new policy issues that fall outside the scope of the annual agenda. The Foundation adopted this shift in 2010, and the adjusted governance structures between the Foundation’s policy staff, the PPC, and the Board have remained in place through the transition to private foundation status in 2016.

Another way that policy staff sought to manage this polarity is through adjustments in how it supports other organizations that engage in advocacy. Prior to the transition to private foundation status, the Foundation typically supported advocates’ efforts (including lobbying) through structured short-term project grants that included detailed milestones and deliverables. This structure gave the Foundation a relatively high level of control and influence over grantees’ work. An upside was that it was easy to ensure tight alignment between grantees’ activities and



Foundation priorities. However, a downside was that this funding approach ultimately limited grantees' ability to adapt to shifting contexts and meaningfully adjust their advocacy tactics in the face of changing circumstances. Grantees expressed feeling stuck in executing project plans and deliverables that may have made sense at the time grants were awarded but which no longer made sense after political circumstances unexpectedly changed. And the limitations surrounding project funding meant that the Foundation was unable to support grantees to expand and strengthen their advocacy capacity or otherwise position themselves to effectively address policy goals that might be longer term in nature.

Structure, along with shared expectations about when responsive actions or quick pivots are needed, helps ensure a shared understanding of policy priorities—enabling greater preparation and motivation to act among staff, leaders, grantees, partners, and Board members.

Along with other changes made during its transition to private foundation status, the Foundation restructured most of its advocacy grants to be general operating support awards with longer funding periods. While this change resulted in some notable upsides related to grantee capacity and flexibility, most grantmaking for advocates was still tied to specific grant deadlines that bore no relation to the timing of windows of opportunity to influence public policy decisions. In addition, grants could only be deployed after a relatively long internal review process (about four months), which sometimes prevented timely responses and therefore limited advocates' effectiveness. Foundation staff recognized that the same balance of structure and flexibility that facilitated their own effective advocacy work would also serve grantees well, noting “[It needed to be] less about work plans and more about giving grantees space.” While the Foundation had been willing to consider funding proposals for time-sensitive advocacy activities outside of the Foundation's established grant deadlines in some cases, that opportunity had not been transparent nor broadly known among organizations that didn't already have close relationships with the Foundation.

In response, the policy and grantmaking teams proposed developing rapid response advocacy grantmaking processes as a parallel and public-facing companion mechanism for supporting advocacy, in addition to the general operating grants that were open for applications on the Foundation's traditional grant deadlines. As it happened, external factors helped to make the case and galvanize internal support for this change. In 2010, the recently passed Affordable Care Act created a need for the Foundation and other health-focused entities to quickly respond to



new opportunities afforded by implementation of the law. A formal rapid response grantmaking option created a transparent mechanism for advocates seeking funding in order to respond to urgent, time-sensitive, and/or unexpected policy threats/opportunities, for which the usual grant deadlines and review timelines would be too slow.

The Foundation's policy staff see that achieving a better balance of structure and flexibility promotes upsides both for their own work and for that of grantees engaging in advocacy. Structure, along with shared expectations about when responsive actions or quick pivots are needed, helps ensure a shared understanding of priorities—including short- and long-term priorities—so that staff across departments, leaders, grantees, partners, and Board members are more prepared and more inclined to take supportive action. Staff have also come to understand how not managing the polarity well leads to downsides that inhibit the effectiveness of the Foundation's policy advocacy and the important advocacy work of their grantees.

## 2. Being a supportive partner and a visible leader

*Working to support or contribute to policy efforts led by others or initiating efforts and using an independent voice*

Another polarity for the Foundation's policy team involves balancing two different roles in relation to other organizations that also seek to influence public policy: (1) supporting others' efforts to advance policy goals—whether directly as a funder of grantees' work or partnering and contributing to coalitions of many actors that may or may not include grantees, and (2) initiating action on an issue, either alone or with others, including taking a public position to independently promote actions or decisions on key issues that are central to the Foundation's mission.

Both roles are viewed as necessary to an effective, well-integrated policy function within the Foundation, and each has implications for relationships across internal teams and with external partners, reputation, and staff capacity. In its role as a supportive partner, the Foundation seeks to be inclusive, approachable, accessible, and willing to contribute to advocacy efforts initiated by other actors. To support others' efforts and to build advocacy capacity within other organizations, the Foundation sometimes backs initiatives that are catalyzed by others, provided they overlap or align with the Foundation's mission and values. This allows the Foundation to build strong relationships with and be in a better position to leverage other organizations' strengths or to influence others to take action when it is needed to pursue desired policy aims.



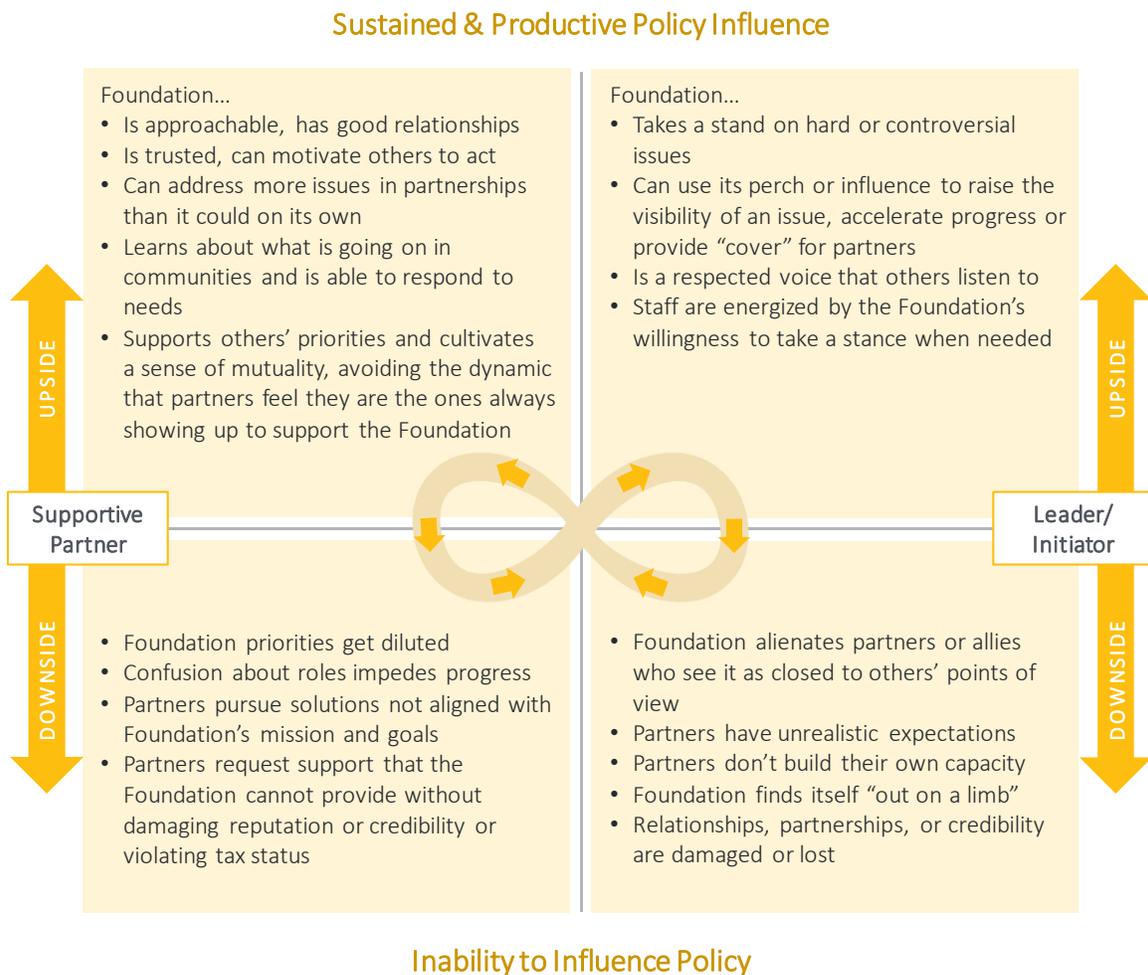
At times, however, the Foundation can best advance goals by initiating or catalyzing action on an issue of importance when other entities are unlikely to do so. By taking on the role of leader or initiator, the Foundation can use its position and voice to speak out on an issue or provide valuable political cover on issues that, if other advocates were to be the primary voice, might put them in jeopardy in some way. By successfully balancing the two roles, the Foundation is better able to leverage the strengths of different groups, motivate others to take on strategic roles, and align a diverse set of partners to advance the priorities or solutions of interest.

Examples of upsides and downsides associated with this polarity are described in Figure 3 on the following page. Being a supportive partner helps the Foundation be viewed as approachable and trustworthy, which promotes aligned planning and action with others, including policymakers, grantees, and other advocates, and leads to expanded influence. Additionally, if partners trust the Foundation, they are more likely to use staff as a sounding board to discuss policy options or advocacy strategy. As a result, staff gain a broader perspective about advocacy efforts in Colorado, which ultimately helps them identify strategic, mission-aligned opportunities and better understand strengths and gaps in the state's health advocacy ecosystem. By using its position and credibility to be a leader or initiator, the Foundation can draw attention to issues or convene others around a common vision, thereby accelerating progress toward a policy goal. However, the Foundation must also avoid alienating partners or allies by being viewed as too directive, forceful, or demanding as a leader, or unreceptive to others' points of views, such that partners feel crowded out.

By successfully balancing the roles of supportive partner and visible leader, the Foundation is better able to leverage the strengths of different groups, motivate others to take on strategic roles, and align a diverse set of partners to advance the priorities or solutions of interest.



Figure 3 | Supportive Partner and Visible Leader: Signals of Upsides and Downsides



This polarity was evident as the Foundation recently moved to more visibly prioritize hunger as an important health issue in Colorado. Policy staff recognized that while a number of organizations are actively working on the issue, there was a lack of cohesion among them, which—along with tensions between several groups—had slowed momentum and meaningful policy progress. There seemed to be an opportunity to jump start effective advocacy and secure durable policy solutions regarding hunger and food security, and Foundation staff considered how they could play a role in addressing it. If they took on a more engaged role than they had in the past, staff did not want the Foundation, as the largest health funder in the state, to be perceived as the “800-pound gorilla,” nor did they want to alienate potential partners by coming across as devaluing their past efforts.

Ultimately, the Foundation did opt to step into a convening role, using its reputation and connections to bring several groups together in hopes of enhancing coordination among them. As



one staff said, “[We were] aiming to draw on all the strengths out there and think about how to realign the work of multiple organizations.” Anticipating some potential discomfort among partners who felt the Foundation was stepping on their toes, policy staff were careful to be transparent about what they hoped to contribute and what they could not provide. While the Foundation did seek to facilitate discussion among partners about desired policy directions, policy staff were also clear that the Foundation would not be able to engage in all of the advocacy tactics that may be needed to pursue them. However, the Foundation committed to using its leadership role and influence to seek other partners to join the effort. Though this proved to be a tricky path to navigate, staff were successful in balancing partnership and leadership roles to facilitate development of a state plan, the Colorado Blueprint to End Hunger,<sup>7</sup> which multiple organizations and the state’s governor ultimately endorsed.

Because managing this polarity is central to maintaining a policy function that works effectively with other advocates, staff noted that guidelines for doing so are woven explicitly into how it defines and implements the Foundation’s policy agenda (see Figure 4). For example, the annual policy priorities that the Foundation’s policy committee approves are categorized according to anticipated levels and types of engagement for each item. These categories of engagement are defined as the following:

Figure 4 | Categories of Engagement on Policy Priorities



<sup>7</sup> <https://www.endhungerco.org/>



A framework for advocacy engagement as a private foundation adopted prior to the organization's tax status transition in 2016 also articulated the Foundation's intent to focus on issues or tactics where the Foundation is positioned to make unique contributions. Policy staff have worked hard to clarify that distinct contributions can be made in both leader/initiator and supportive partner roles. When determining the Foundation's potential contribution to a cause or issue, policy staff consider the specific issue(s) being addressed, the ecosystem of potential partners and allies, and where there are strengths and gaps, as well as what is happening in the broader policy landscape.

Policy staff have worked hard to clarify that distinct contributions can be made in both leader/initiator and supportive partner roles.

Staff also consider the overall balance of their own policy advocacy portfolio and the mix of issues aligned with the Foundation's focus areas and priorities. As staff said, *"We've borrowed some language from our financial investment team to emphasize [with other departments, our Board, and external partners] that a mix of different roles and areas of focus in your portfolio is helpful and strategic."* This language and framing help staff have more explicit conversations about the range and mix of roles they may play across focus areas and priorities and over time, something that has become even more important given the Foundation's current focus areas and priorities, which have underscored the need to build relationships with a broader set of advocacy partners.

In those (and all) partner relationships, it is important to right-size partners' expectations. Foundation staff have learned that role clarity – across internal teams and with external partners – is critical. When taking on a catalytic role, the Foundation must clarify what their leadership means—for example, what advocacy actions and what kind of funding the Foundation will contribute and how different advocates' work will be acknowledged or to whom accomplishments will be attributed. When the Foundation participates as a partner in collective policy advocacy efforts, it is equally important to clarify roles of different partners to avoid duplication or power struggles.

Over time, staff have become more intentional about surfacing partners' expectations and being transparent about their own. Staff perceived that within the Blueprint to End Hunger efforts, role clarity helped policy partners align and unite, thus accelerating impact. For example, the governor's stated priorities for health policy now include eliminating hunger, and the issue has benefited from increased energy, visibility, and momentum as a result. Blueprint partners have also expanded beyond the "usual" allies who had previously been engaged in these efforts, and the coalition now includes a greater number of organizations representing more parts of the



state and more sectors. Specific policy wins have resulted, including expanded SNAP eligibility thresholds and reduced barriers for those receiving food or cash assistance aimed at increasing food security. In addition, state agencies have strengthened their partnership such that organizations now talk with one another more regularly and align their efforts more productively.

By reflecting on instances where things have or haven't gone well, the policy team has developed a well-honed sense of situational awareness. Regularly tapping into that awareness, staff are able to determine the right role at the right time and get ahead of potential challenges such that the Foundation is better able to maintain trust with its partners and allies (internal and external) and avoid role confusion, unrealistic expectations, or threats to the organization's credibility and reputation. When these conditions are present, the Foundation is better positioned to maintain its influence and realize progress on a greater range of issues.

### 3. Maintaining political neutrality and being provocative when needed

*Working to advance issues for which there is broad support and advocating for important mission-related issues that are potentially divisive*

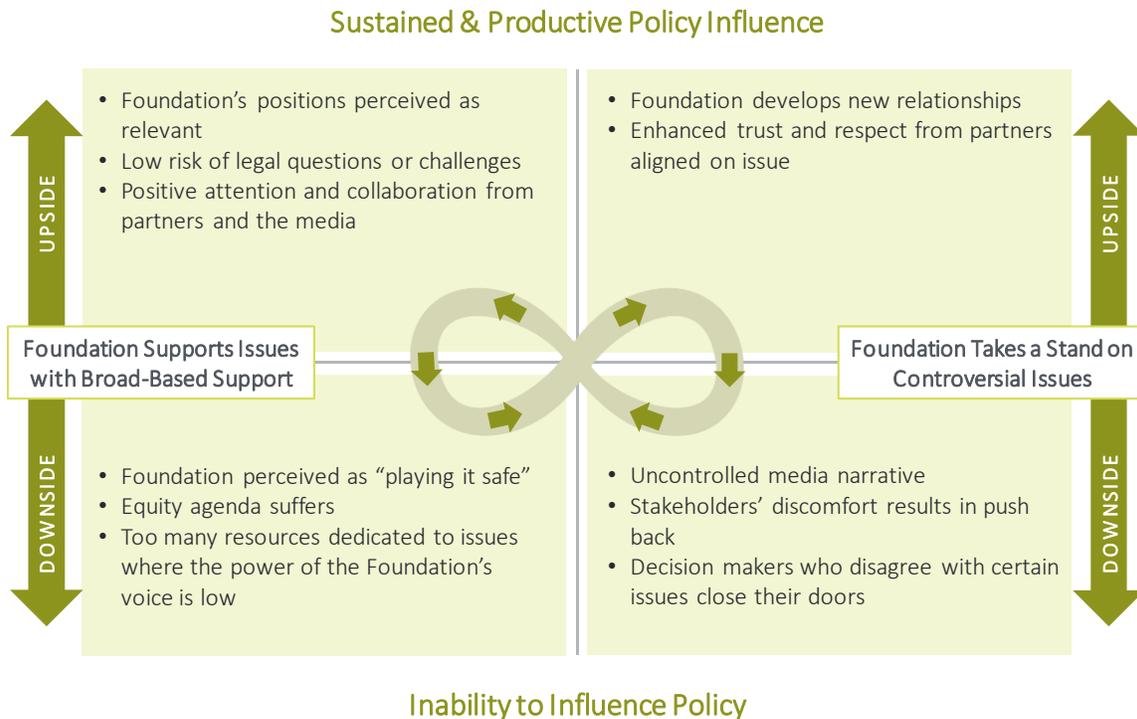
In its policy efforts, the Foundation strives to maintain a non-partisan reputation that makes it a credible and trusted voice among a variety of audiences. The Foundation provides data, stories, and information that many find credible, and staff have developed strong relationships with many different advocates and decision makers who hold a range of beliefs, viewpoints, and positions. The Foundation's credibility and effectiveness are enhanced by the respect it has earned across a spectrum of policy actors. When the Foundation's policy priorities reflect common ground issues that have broad support, it is easier to uphold a trusted, non-partisan reputation.

However, when the Foundation takes on policy issues central to its mission where opinions are divided, whether along party lines, geography, or philosophy, it has the potential to jeopardize its reputation among actors with differing points of view. When mission-aligned priorities lack broad support or are more inherently contentious, decisions and choices about how to advance these priorities while maintaining the organization's political credibility over time are complex and nuanced—thus, creating a polarity. It is necessary to confront and manage this polarity as the Foundation works to advance issues and promote policy solutions regardless of whether issues are broadly supported or not.



When this polarity is well managed, the Foundation can stay true to its mission and influence meaningful outcomes on a range of policy issues without weakening its reputation and credibility as a trusted institution. If the polarity is not well managed, the Foundation risks being viewed either as partisan or as “playing it too safe,” with consequent implications for its reputation, credibility, and effectiveness.

Figure 5 | Working on Broad Support and Controversial Issues: Signals of Upsides and Downsides



This polarity was evident surrounding the Foundation’s work to secure agreement among multiple entities about an expanded scope of practice for Advanced Practice Registered Nurses (APRNs). The policy proposal was viewed by some as a mechanism to expand access to health care in rural, underserved areas of the state. Staff saw clear logic in the mission-aligned policy goal, so they were somewhat surprised when skepticism emerged from some members of the Board. Some of the state’s professional associations that engage in advocacy did not fully support the proposal to expand APRN’s scope of practice because of concerns about the implications for physicians’ authority. The PPC included well-connected physicians who were members of professional associations representing physicians and raised concerns to Foundation policy staff. While policy staff is aware that not every policy will be popular, they did not want to be unreceptive to differing points of view.



Policy staff discussed the issue with the PPC, reflecting the spectrum of opinions and how the proposed change regarding ARNP's scope of practice could, in fact, be critical to expanding clinical services in the state's rural regions and therefore advance the Foundation's strategy to improve healthcare access. The discussions proved helpful, and Board members' opinions on the issue shifted. As staff recounted, Board members better understood the debate and were able to represent the Foundation's position to their professional peers. Some Board members even agreed to provide testimony to the legislature supporting the expansion of APRNs' scope of practice and, as Foundation staff remarked, *"Since our Board includes some influential people, that was helpful."* Thus, efforts to recognize and proactively respond to divided opinion and manage controversy surrounding the Foundation's position helped ensure continued realization of upsides.

Staff shared that, in general, broadly supported issues have potential to easily attract favorable media coverage. However, when an issue has mixed or divided support, proactive detection and response helps assure the Foundation can successfully advance its priorities and maintain good alignment (internally and with external partners). And because the level of scrutiny from the Board and because the amount of time required to achieve alignment across internal teams will be higher when the Foundation is supporting issues that have mixed or divided support, implications for staff time must be accounted for.

When an issue has mixed or divided support, proactive detection and response helps assure the Foundation can successfully advance its priorities and maintain good alignment (internally and with external partners).

Foundation staff noted that approaches to managing this polarity include assuring that its policy analysis and messaging de-emphasize partisanship and emphasize the credibility of its information, the potency of collective advocacy, and common aims.



## Conclusion

This brief examined polarities relevant to the Foundation’s policy advocacy function to highlight ways that tensions inherent in the Foundation’s policy advocacy efforts can be successfully managed. Through recognition of inherent tensions and experimentation with ways to manage those tensions, the Foundation has been able to actively manage the polarities in ways that helped contribute to alignment of its internal work, more effective policy advocacy, and progress on goals and priorities. Over time, Foundation staff have become better able to recognize signals that their work is out of balance and make timely adjustments to better realize upsides and avoid downsides. In addition, staff have found ways to explicitly incorporate management of the polarities into internal governance and culture, which helps to minimize disconnects or conflict across internal departments and promote alignment—a key to realizing upsides.

While the polarities examined in this brief are specific to the Colorado Health Foundation, they may have applicability and relevance for other foundations that engage in policy-related efforts. We hope the information and examples presented help to inform other foundations’ future planning and implementation. Policy advocacy action plans that explicitly recognize and account for polarities inherent to this work can support foundations to better implement and, eventually, institutionalize the approaches and practices most likely to create and sustain alignment and success.



# Appendix: The Colorado Health Foundation's Focus Areas



## Maintain Healthy Bodies

We ensure that all Coloradans have access to high-quality, comprehensive primary care when and where they need it and that children can be active in a safe and fun way every day. Priorities in this focus area include [Primary Care](#) and [Children Move More](#).



## Nurture Healthy Minds

We address the behavioral health needs of our state by fostering the social-emotional development of children, equipping youth and young adults with resiliency skills, and giving adults – with mental health and substance abuse challenges – continued support on their recovery journey. Priorities in this focus area include [Early Childhood Social-Emotional Development](#), [Youth and Young Adult Resiliency](#) and [Adult Recovery](#).



## Strengthen Community Health

We partner with communities as they identify and tackle health-related challenges, and invest in quality food and affordable housing, to create a foundation for which communities can develop locally-specific solutions that lead to health equity. Priorities in this focus area include [Community Solutions](#), [Food Access and Security](#) and [Affordable Housing](#).



## Champion Health Equity

We support individuals and organizations as they develop and strengthen the skills necessary to advocate for and promote a more equitable health environment – one where our policies reflect our priorities, and health is in reach for all Coloradans. Priorities in this focus area include [Advocacy](#) and [Capacity Building](#).



## Cross-Cutting Efforts

The Foundation invests resources in efforts that address multiple priorities at once. By working deeply within a specific geographic or subject area, we can better understand and address the factors that affect a given area. These long-term efforts require extended focus and investment, which means that we are careful to take on only a few of these at a time. Currently, the Foundation's cross-cutting efforts include [Healthy Schools](#) and [Locally-focused Work](#).



