



Best Practices for Advocates Planning a Funder Briefing

Consumer health advocates across the country are exploring how to educate and inform local, state and national foundations about advocacy and their role in advancing and shaping health coverage and transforming the health care system. Funder briefings are one tool to facilitate this information sharing. A funder briefing, often times structured as a roundtable discussion, allows advocates, key stakeholders and philanthropic leaders to learn about, discuss and explore opportunities on how those leaders can support advocacy efforts. It is also an opportunity to connect directly with consumer health advocates, hear about challenges and successes, and explore their potential involvement in strengthening and sustaining advocacy.

The following toolkit includes tips and tools from advocates that have organized funder briefings. It will guide you through the following steps to ensure funder briefings facilitate the development of meaningful relationships while identifying ways to leverage funder resources to ensure advocacy efforts have a real impact at the state and local level.

Step 1: Identify a Funder to Co-Host

Advocates should explore having a credible funder serve as co-host for the briefing. This gives advocates buy-in from the funder community and can prompt additional philanthropic leaders to attend. Ideally, your co-host will provide advocates with additional support behind planning, conducting and following-up on the meeting. A funder co-host could:

- Provide advocates with an invitation list of additional funders, including those outside the organization's current connections or issue-areas;
- Help advocates shape the desired outcomes, agenda and email communications to ensure they are tailored to funders;
- Help determine the meeting's tone, identifying what funders are interested in hearing and determining how advocates should frame these issues. The funder partner could also provide an insider's perspective of what to focus on to ensure an appropriate framing of issues;
- Help facilitate the funder briefing and assist in the crafting and sending of invitations and subsequent follow-up emails to attendees;
- Help to identify, secure and sponsor potential funder briefing locations, lunches, etc.;
- Consider whether it's best for a funder to serve as the only host and have advocates play a planning/presentation role;
- Identify what attendees and advocates should leave with following the briefing, recognizing that it may not always end with a pitch for funding or an "ask" to submit a proposal; and
- Offering credentialing from one foundation to others about the work of the advocates hosting the convening.

Step 2: Plan Early

Once you've identified a co-host (if applicable), identify a potential date to hold your funder briefing in order to begin planning for it as early as possible. You'll want to ensure you have enough time to:

- Outline your desired outcomes;
- Develop a list of potential funders to invite based on your desired outcomes; and
- Identify a venue, time and date and potential coalition partners or key stakeholders who could to speak to the impact of partnerships in advancing consumer health advocacy efforts.

Step 3: Determine the Best Date to Hold Funder Briefing

Determine a date that will accommodate funders, coalition partners and co-host – giving as much notice as you can. This will maximize attendance and help with planning if you want any national funders or speakers to attend. Consider hosting the briefing in conjunction with another meeting, like a convening funders may attend, to maximize attendance. Work with your co-host and coalition partners to determine an accessible date, and if there are specific funders whose attendance is of higher importance, check dates with them in advance. Dedicate a couple of hours during the day to provide ample time to develop these relationships while also being respectful of attendees' time commitments.

Step 4: Draft Meeting Agenda and Outline Desired Outcomes

Think about what outcomes you'd like to achieve by the end of the meeting. Ask yourself, "what do we want people to leave the discussion with?" In drafting your meeting's agenda, remember that your desired outcomes won't always be "increased funding or secured support." Funder briefings should be seen as a way for advocates to cultivate relationships and new partnerships, as well as introduce new areas of work to familiar funders.

Consider having co-host, coalition partners or funders help craft and offer feedback on your meeting agenda and desired outcomes. For example, work with your funder co-host when drafting your agenda to make sure you capture what would be most helpful and gain more traction from a funder's point of view. Make sure the content of your discussion meets the interests of those in the room. For example, if the desired outcome of your meeting is to inform funders about the impact consumer health advocacy has made locally, be sure to highlight key points that focus on these impacts. Coordinate with your coalition partner to speak about the role partnerships play in advancing consumer health advocacy efforts at the local and state level. Also, make sure you allocate enough time in your meeting agenda for discussion; it's important to avoid an agenda that is too presentation-heavy, but rather focuses on providing ample time for funders to ask questions and engage in discussion with you and each other.

Sample Desired Outcomes

- Participants will have a better understanding of the role consumer health advocates play in improving coverage/access, health care value, population health and health equity through multi-stakeholder relationships.
- Participants will have identified opportunities to collaborate with [YOUR STATE] advocates in their efforts to increase access to health coverage/care and/or improve the value of that care for lower income [STATEians].

Step 5: Develop a List of Funders to Invite as Attendees and Engage as Speakers

Ideally with your funder co-host, compose a list of funders who you'd like to attend based on your desired outcomes. For example, if you'd like to host a funder briefing about your work tailored to a particular region in your state, target those local funders. Also, think about funders you'd like to develop stronger relationships with to possibly support consumer health advocacy efforts in the future. Explore inviting funders from different issue areas that could benefit from hearing about your work, especially given how a variety of consumer health issues overlap with other issue areas, such as housing, education, social determinants of health, racial justice, civic engagement and more.

Step 6: Create Written Materials Capturing Your Organization's Work

Look into developing a short document (i.e. a case statement) capturing the work of your organization for funders to walk away with after the briefing. Explore having coalition partners provide brief written testimony as part of the document to convey the importance of sustained advocacy infrastructure and the value of partnerships. Include in your case statement the role consumer health advocacy organizations play at the state and local level, noteworthy accomplishments and current challenges, and opportunities to help make the case for how funders' support can benefit consumers.

Step 7: Explore Partners (Local and/or National) to Attend the Funder Briefing

Explore inviting a national/local funder or partner you have worked with to provide a national or local perspective on key accomplishments made by consumer health advocacy organizations. For example, advocates in Ohio reached out to Community Catalyst to attend and speak at their funder briefing to provide a brief overview of the system of advocacy model and national context for coverage.

- **Identify compelling partners to serve as speakers.** Advocates may want one national partner or funder to provide a perspective on some of the key accomplishments made by consumer health advocacy groups and to share the unique role consumer health advocates play in coverage/access issues. If you're thinking about involving national partners or funders in your meeting, be cautious about how much time is dedicated to discussing policy issues that may not be state-specific or resonate strongly with state/local funders in the room. If you're planning on having national partners present, make sure their presentation focuses on state-specific needs and your organization's ability to fill those needs for the targeted community. Explore having a local or state partner speak to the role partnerships play in advancing consumer health advocacy efforts and demonstrate how you work together. Also, think about inviting a local consumer to highlight the impact of your organization on their life.

Step 8: Draft and Send a Save the Date

After determining the date of the briefing, work with your co-host to send out a "Save the Date" *ideally two months* in advance that briefly describes what the funder briefing will cover. The Save the Date could also include an RSVP link or agreed upon email for follow up. It is best if the "Save the Date" is sent from a funder since funders may be more likely to open the email from a member of their funder network.

Step 9: Draft and Send Out Email Invitation

Once advocates have worked with their co-host to determine you're the audience for the "Save the Date," craft an email invitation. Send the invitation out *two weeks – one month* in advance of the meeting. This will provide funders with details on what the briefing will cover, your desired outcomes, speakers, and the date, time and location of the briefing. The invitation should also include an email or link to have funders register to attend the briefing if they haven't done so already. **See Appendix A below for a Sample Email Invitation.**

Step 10: Send Agenda

Advocates should work with their co-host to draft an agenda to send to participants about what to expect during the funder briefing. Send the agenda *one-two weeks in advance* of the meeting. In the week leading up to the funder meeting, it would be helpful for your funder co-host to send a final agenda for all registered participants. **See Appendix B below for a Sample Agenda.**

Tips for developing effective agendas

- Make sure you include the desired outcomes and purpose of the meeting at the beginning;
- Include time allocated for a brief welcome and introductions of attendees;
- Include call-in information for participants who are offsite;
- Include the meeting venue, address and specific location (e.g. 2nd floor conference room);
- Outline meeting topics and potential discussion question(s);
- Include time allocations for each broad section of the agenda and who will lead that discussion;
- Allow time for Group Q&A;
- Include Follow-up and Next Steps;
- Ask for feedback on the meeting at the end;
- Note when you'll adjourn the meeting; and
- Develop an internal facilitator's agenda to help guide and direct the meeting. **See Appendix C below for a Sample Facilitator's Agenda.**

Tips to prepare for the funder briefing

- Make sure there are enough copies of the final agendas for all participants;
- If using Powerpoint slides, make sure there are color-printed copies available;
- Arrive early to test AV and to make sure the room has the appropriate equipment needed to conduct the presentation. Test the projector and the phone. Make sure both the clickers work and the cables are compatible to the computer;
- Include name badges, list of participants/sign-in sheet and phone set-up for those who would like to participate by phone;
- Double-check name spellings and organization/foundation names on materials;
- Identify a point person to capture next steps and highlights; and
- Set up a welcome table for materials, name badges and assign a staff person to greet attendees.

Tips for the day of the funder briefing

- Be sure to make enough copies of the meeting agenda, participant list and any other relevant reports/materials to inform funders about the work of your organization and your impact at the local and state level;
- At the welcome, make sure your co-host shares the desired outcomes and frames the conversation;
- Set up time for introductions and ask attendees to share why they are interested in your funder briefing;
- Encourage participation by all attendees;
- Pause for questions and dedicate time to hold group discussion, recognizing that it's OK for the agenda to be flexible to best accommodate discussion. For example, if one section of the agenda seems to be going over time but is resulting in a particularly robust dialogue, the facilitator may want to think about reworking remaining agenda items to allow for continued discussion;
- Make sure you assign someone to serve as a time-keeper to ensure the meeting operates smoothly; and
- Encourage attendees to be comfortable asking questions and learning and sharing experiences.

Step 11: The Most Important Step – FOLLOW UP

Advocates should work with their co-host to develop a follow-up plan to continue cultivating relationships with funders. In the days following your funder briefing, advocates should:

- Work with the co-host to determine next steps, including: how and when advocates would like to follow-up and connect with funders and what asks they can make following the meeting;
- Send follow-up email in collaboration with co-host to thank all funders and participants for attending the briefing;
- Include in follow-up communication any materials or resources that may be helpful and informative;
- Add funders to the organization's list of key contacts. Conduct personal outreach by drafting notes to keep them informed of any major achievements or developments from the organization; and
- Plan a debrief with staff and partners involved in the planning process to identify what worked well, what didn't work well, how to move forward with next steps and how advocates should follow-up with funders.

Conclusion

Funder briefings have provided advocates in states like Pennsylvania and Ohio with opportunities to inform philanthropic leaders about the role consumer health advocacy plays at the state level as well as the impact consumer health advocates have had at the local level. Advocates have used funder briefings to make the case to local and state funders about the need to continue investing in consumer health advocacy and demonstrate ways to partner with advocates to improve coverage and access issues and improve value in health care for consumers. These local forums and roundtable discussions have helped bring together advocates, funders and key stakeholders to explore ways to improve health care access and the health care system for millions of consumers. Moving forward, these conversations will be critical in ensuring that states' consumer health advocacy infrastructures are sustained and strengthened to respond to emerging health care issues and have buy-in from philanthropic leaders looking for ways to maximize investment in efforts to improve health care coverage, access and delivery for millions across the country.

Appendix A:

Sample Invitation Email

Dear colleagues,

While much attention about the Affordable Care Act (ACA) has focused on the coverage provisions, the ACA has also been a catalyst in the acceleration of extensive efforts to transform the health system and improve value by enhancing quality and reducing costs. As we begin to enter this next important phase of work, state and community based advocacy organizations remain as critical as they have been throughout implementation. Advocates view their engagement in these transformative discussions as critical to ensuring that coverage provides the care that people need and is affordable to individuals and society more broadly. Fortunately, [State] advocates have started to think about these issues, work on policy change and form partnerships to help create a system that works better for consumers.

[Funder Co-host] am writing to invite you to a meeting to learn about the excellent work of the [Your Organization] and their partners to make sure that [STATEians] not only get the coverage they need, but have access to better quality care. We will also discuss [State] in the larger national context as we emerge as a leader in some aspects of health system change.

Please join [Funder Co-Host] to hear more about [Your Organization]'s role with this important work. To RSVP, please contact [Funder Co-Host] at [Funder Co-host email] or [Funder co-host phone number]. I hope to see you on [Date].

All the best,
[Funder Co-Host Name]

Appendix B:

Sample Participant Agenda

Funder Briefing
Pennsylvania Health Access Network (PHAN)

Double Tree Hotel Philadelphia
237 S. Broad St. Philadelphia, PA 19107
Conference Line: # ; Participant Code #
Wednesday, Sept. 30, 2015
10 a.m. – 11:30 a.m.

Agenda

By the end of the briefing:

- Participants will have a better understanding of the health policy and systems change landscape in Pennsylvania;

- Participants will have a better understanding of the role consumer health advocates play in coverage/access issues and efforts to improve value in health care and why the [Foundation] has decided to invest in Pennsylvania; and
- Participants will have identified opportunities to collaborate with Pennsylvania advocates in their efforts to increase access to health coverage and care and to improve the value of that care for lower income Pennsylvanians.

1. Welcome and Introductions 10 a.m. – (Community Catalyst)
2. Building a Sustainable System of Advocacy in PA 10:10 a.m. – (Community Catalyst and Funder)
3. Health Policy and Systems Change Landscape in PA 10:25 a.m. – (Community Catalyst and PHAN)
4. Pennsylvania Health Access Network: Engaging Consumers in Health Reform + Health System Transformation 10:40 a.m. – (PHAN)
5. Discussion + Next Steps Facilitated 11:10 a.m. (Community Catalyst)
6. Closing 11:30 a.m.

Appendix C:

Sample Facilitator’s Agenda

Funder Briefing
 Universal Health Care Action Network (UHCAN) Ohio
 Trinity Cathedral
 2230 Euclid Ave. Cleveland, Ohio 44115
 Conference Line: # ; Participant Code #
 Friday, Nov. 20, 2015
 11 a.m. – 12:30 a.m.

By the end of the briefing:

- Participants will have a better understanding of the health policy and systems change landscape in Ohio and how their communities and priorities are affected by health system transformation;
- Participants will have a better understanding of the role consumer health advocates play in improving coverage/access, health care value, population health and health equity through multi-stakeholder relationships;
- Participants will learn why [Foundation] and Community Catalyst have decided to invest in Ohio; and
- Participants will have identified opportunities to collaborate with Ohio advocates in their efforts to increase access to health coverage/care, improve the value of that care for lower income Ohioans and build the Culture of Health in Ohio.

1. Welcome and Introductions – 11:05 a.m. – (Funder and Community Catalyst)

- Provide general welcome, housekeeping items and then turn over to CC for formal welcome and goals for the day;
 - Frame this as a discussion and encourage people to share and ask questions as we go through; and
 - Highlight this as an opportunity to come together to educate one another and to think about potential partnerships.
2. Building a Sustainable System of Advocacy in Ohio – 11:15 a.m. – (Community Catalyst)
- CC will provide a brief overview of the system of advocacy model and national context for coverage and health system transformation;
 - CC will discuss why [Foundation] is funding advocacy and why [Foundation] decided to invest in OH;
 - CC will discuss what [Foundation] sees as the role of the the consumer advocate and consumers in efforts to improve health coverage and access and to improve value in health care through better quality and lower costs; and
 - CC will highlight how UHCAN Ohio has been a national leader in tackling issues (Medicaid expansion, Medicaid reform, one of 12 duals demos, dental access through modernizing workforce, State Innovation Model, consumer engagement.)
3. Health Policy and Systems Change Landscape in Ohio – 11:40 a.m. (UHCAN Ohio and Coalition Partner)
- Provide overview of Affordable Care Act implementation in Ohio;
 - Share opportunities for health system transformation in Ohio; and
 - Highlight impact of Ohio’s political, policy and health system landscape.
4. Q&A and Discussion – 12:10 p.m. (Funder)
- Open up for discussion and include questions for funders to discuss their priorities and how they might be impacted by health system transformation at a local level. Questions will include:
 - Is there an opportunity to have another conversation with you or others at your organization to build awareness of the health policy and systems change landscape in Ohio or the role consumer advocates can play in moving coverage/access work and health system transformation forward in a consumer-friendly way?
 - Consumer health advocates will need to continue to build partnerships and develop relationships with stakeholders in health and non-health sectors to move this important work forward. We would love to hear about other organizations you are funding that could be potential partners in this work. Would you be willing to help UHCAN-Ohio and their partners connect with these organizations?
 - Would you like more information? Would local forums be helpful?
 - What are other potential opportunities for partnering with UHCAN-Ohio to move this work forward?
5. Closing – 12:30 p.m.

**Authored by,
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Community Catalyst works to ensure consumer interests are represented wherever important decisions about health and the health system are made: in communities, courtrooms, statehouses and on Capitol Hill.

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