SECTION TWO:

Constituent Engagement

Why it's important:

Organizations that are interested in changing some of the causes of the problems facing their constituents can start by learning from the insights of those who "live the experience".

Organizations in the early stages of embarking on social change often see constituents as "clients" or people who come to access services and are provided with referrals and resources to receive help for their current situation. As the organization considers a changing approach to and role for constituents, it may create strategies for leadership development both within and outside the organization and find, that overtime, opportunities expand to include community organizing, civic participation, public advocacy and other activities that promote change. Engaging constituents beyond the service delivery process helps organizations to learn about common barriers that they face such as a non-responsive landlord, as well as problems navigating and accessing systems that are designed to help them. Building the role of the client moves them from a recipient to someone with agency, what we call a constituent. Finally, partnering with clients and supporting their leadership results in working with people rather than for people, making the service provider's job more effective.

Service organizations are sites where people can gather socially and to address local issues. Inviting constituents to participate in activities within the organization can create the first steps to build confidence and acquire new skills. In addition, constituent participation establishes connections that can reduce isolation and increase social cohesion, both of which have been shown to have a direct relationship to good health. The challenge for organizations is to understand their current approach, where they want to go and what needs to be considered in their culture and practice.

RESOURCES FOR THE CONSULTANT:

From Input to Ownership: How Nonprofits Can Engage with the People They Serve To Carry Out Their Missions

In this article, the authors discuss ways that nonprofits are engaging their constituents for input as well as for programmatic co-creation and ownership where a more active role is taken.

Caught in the Middle: Community Development Corporations and the Conflict between Grassroots and Instrumental Forms of Civic Participation

This article explores the various roles clients can play as citizens participating in community based organizations (specifically community development corporations). It includes a "Citizen Participation Continuum" which helps organizations and groups understand the source of conflicts between different types of citizen participation and provides organizations with a road map for evaluating programs that promote change in society.

Listening to those who Matter Most

This Stanford Social Innovation Review article offers a basic understanding of the importance of including the views and experiences of beneficiaries.

RESOURCES TO USE WITH THE ORGANIZATION:

Integrating Civic Participation Strategies into Service Organizations:

The goal of this toolkit by the National Council of La Raza, is to create a "participation continuum" that links constituencies to a variety of civic opportunities such as citizenship promotion and engaging in issues. It describes the continuum, a sample intake form, tools that leaders can use to engage constituents, and sample workshop materials. See section 2 for "Civic Participation as a Component of Service Provision".

Catalysts for Change: Centro Binacional Para el Desarrollo Indigena Oaxaqueno:

This case study can be used as part of a learning community activity. Group members might read it before meeting and answer questions about different ways to be engaged and overcome barriers to participation. Then, discuss what is similar and different about their situation and strategies for change. See page 11 of Case Study.

Discussion Guide for Exploring Community Engagement:

This is a series of small-group discussion questions to use during an agency retreat or extended meeting that offers a structured opportunity to explore the organization's potential for community engagement work.

Initial Assessment for Constituent Engagement

The simple assessment shown here is meant to (1) help the organization determine readiness to explore this topic, and (2) spark thinking about where to begin and what goals to develop. The tool consists of statements that describe constituent role in the organization and how they are currently involved. It can be best used if the organization:

1. Carefully considers when and with whom to conduct the assessment. Will you use it in a staff meeting, at a board meeting, with leadership, with other partners?

2. Is clear about what to do with the results. Will they be shared broadly? How will the results impact planning and goal setting?

3. Uses the results to think through operations, programs and process as it relates to constituent engagement.

4. Enhances discussion about trends, patterns and current practice

When giving directions, emphasize that there are no "right" or "wrong" answers and for respondents to check "all that apply". Determine who will compile the responses and how they will be presented.

Constituent	Organization
A. Constituents are service recipients only	A. We provide services based on regulations and requirements of our funding sources and does not include client/constituent feedback.
B. There is a mechanism for constituents to give us feedback on services (e.g. surveys, evaluations, comment cards)	
C. Constituents regularly have input on their case planning	B. Some programs include constituent involvement/feedback.
D. Constituents have input in program design	C. Staff at all levels are trained to listen and respond to constituents voices
E. Constituents are on the board or other governing structures	D. Constituents are partners in the work
	E. Constituents successfully participate in the organization at every level

HANDOUT | Community Development Roles

Nonprofit service organizations can play a variety of roles in advancing community development. The following questionnaire asks you to consider how your organization's experiences and interests might be tied to a specific role.

1. Consider the following roles listed below and circle the level of experience and interest that best matches your organization.

6 = Strong experience and strong interest

5 = Some experience and strong interest

4 = Some experience and some interest

3 = Low experience and strong interest

2 = Low experience and some interest

1 = No experience and no interest

2. Add your total score for each alphabet. While FRCs can and do play a variety of roles in advancing community development, a higher score may suggest that your organization is more likely to take on a particular role.

Total for A = _____

Total for B = _____

Total for C = _____

Total for D = _____

RESOURCES TO USE WITH THE ORGANIZATION:

An organization may take on a variety of roles as it works with the community. The following handout was developed by the National Community Development Institute (NCDI) to encourage organizations to reflect on those roles. Once the participants complete the assessment and analysis, lead a discussion about the alignment of "what they do" (roles assessment) with the above responses. If organizations are doing advocacy or facilitator work, how are constituents involved? What does the mission say about the work? Is it aligned with the roles that the organization plays? What are the implications for goals?

	Roles Our Organization Might Play	Organization's Experience and Interest					
A	Called on by local decision makers (e.g., health department) to offer your opinions.	6	5	4	3	2	1
B	Experienced in bringing different people together for discussions.	6	5	4	3	2	1
C	Interested in starting a new project that will benefit the community.	6	5	4	3	2	1
D	Able to manage complex programs or activities.	6	5	4	3	2	1
A	Experienced in participating in local planning processes.	6	5	4	3	2	1
B	Interested in bringing people together to identify and address common priorities.	6	5	4	3	2	1
C	Able to envision projects and activities that have not been tried.	6	5	4	3	2	1
D	Called on to fix or improve an existing program or service.	6	5	4	3	2	1
A	Interested in analyzing policies that impact our constituents.	6	5	4	3	2	1
B	Able to collaborate on projects of common interest.	6	5	4	3	2	1
C	Called on to work with others on new projects that can benefit the community.	6	5	4	3	2	1
D	Experienced in formulating and carrying out plans.	6	5	4	3	2	1
A	Able to assist others in raising their own concerns or views.	6	5	4	3	2	1
B	Called on to help resolve conflicts or disagreements.	6	5	4	3	2	1
C	Experienced in working on new projects that can benefit the community.	6	5	4	3	2	1
D	Interested in managing a project that will benefit the community.	6	5	4	3	2	1

HANDOUT | Community Development Roles

A = ADVOCATE

As an advocate, organizations are involved in monitoring and influencing decisions that have the potential to impact your core constituents. Some examples of activities that might engage advocates include:

- Helping community members understand proposed or approved rules or policies.
- Developing relationships with local decision makers and create opportunities for community input and participation.
- Initiate, support and sustain a community organizing campaign.
- Monitoring proposed legislation and policy.

B = FACILITATOR

As a facilitator, organizations are involved in creating a "safe space" for dialogue among community members. Some examples of activities that might engage facilitators include:

- Creating opportunities for people to meet and discuss community-wide issues.
- Serving as a clearinghouse for information on a range of issues that interest the community.
- Helping to resolve conflicts or disagreements.
- Collaborating on a project that brings together
- local schools and nonprofit service providers.

C = DEVELOPER

As a developer, organizations are involved in starting activities or projects that are of interest to the community. Some examples of activities that might engage developers include:

- Working with others on a new project to benefit the community.
- Identifying unmet community needs and beginning a process to address them.
- Seeking seed funding to support a new project.
- Introducing a new service or program.

D = MANAGER

As a manager, organizations are involved in ensuring that the implementation of an existing program or service is done effectively. Some examples of activities that might engage managers include:

- Fixing or improving an existing program or service.
- Formulating and carrying out plans.
- Managing multiple people, programs or activities.
- Owning, operating or managing a shared facility.

Goals and TOC

As a result of the previous assessment(s), goals will begin to emerge about constituent engagement that will set the stage for determining strategic direction and the action necessary to accomplish those goals. The Theory of Change (TOC) method, described in the Introduction, can assist communities to think about, plan and evaluate their work. This section includes suggestions for specific goals and outcomes relating to Constituent Engagement. Preparation for this requires the following:

1. Agreement about when to embark on the process and who to involve
2. A clear understanding of the time and resources required
3. An individual or small group that will work with the consultant in between large group process to integrate ideas and shape the final document

RESOURCES TO USE WITH THE ORGANIZATION:

When deciding who to involve in the process of goal setting, it may be useful to ask the following questions about a broad range of stakeholders:

1. What viewpoints and expertise are necessary to make informed decisions present?

2. Who can effectively participate in the discussion (Are there any barriers in terms of language, substantive knowledge of the programming area, hierarchy, or politics?)

3. What they will get out of participating in the design workshop

4. Is this the best way to gather information from them?

5. Do they have the time and resources to participate?

Sample Goals and Outcomes:

It may be helpful to have sample goals and outcomes for constituent engagement in mind prior to the meeting to help guide the discussion and formulate questions.

- Get input from constituents on effectiveness of program and program design
- Build the ability of constituents to advocate for themselves and others
- Bolster constituents' ability to be engaged citizens and get involved in the community
- Ensure constituents are on staff or serve on the Board of Directors
- Build power with the community

Case Studies

The following case studies can be used to spark thinking about how different organizations engage their constituents. The process below can help the group learn from the case studies and apply to their organization:

- Use three charts labeled **"What?"**, **"So What?"**, and **"Now What?"**
  - What did you read that resonated for you? (WHAT?)
  - What did you learn about the agencies as it relates to Constituent Engagement? What were some of the issues they addressed and how? (SO WHAT?)
  - How can this apply to your organization? (NOW WHAT?)
- Pairs or 3s start at a different chart
- 5 minutes per chart to add strengths/focus areas
- Move to next chart – each group at each chart
- What would you like to learn more about?

Shields for Families: This case study tells the story of Shields for Families in Los Angeles that actively integrates social change and service provision by building on the leadership capacity of their clients and staff. Shields creates many opportunities for learning, engagement, and social change efforts that are exemplary. Use this case study to learn from Shields and discuss what would work locally and how to move forward. See page 29 of Case Study.

Developing the Leadership of Recipients: This monograph from BMP is part of a series highlighting 5% shifts, or small changes that organizations can make to "reinvent" themselves. In this edition, two examples are presented with agendas for discussions, questions to explore, and a handout to consider different types of engagement.

Engaged Governance

This article includes several models for community engagement governance that can be used to explore how the organization is currently governed and what might happen when other stakeholders are engaged in all aspects of the organization

Overarching Questions to Address In Each Area of Organizational Assessment

The questions below are adapted from Cultural Competency: Organizations and Diverse Populations: The Handbook of Community Practice, Patricia St. Onge, 2013. It can be part of the process to assess organizational cultural competency. Questions are based on the belief that working towards organizational cultural competence is an on-going process that requires constant vigilance because the negative effects of racism, sexism and oppression need on-going understanding and confrontation.

- Does this aspect of our organization actively work to erase inequity?
- Is this aspect of our work part of the greater movement to create and support social change?
- What are the power dynamics at play?
- Is there a single cultural lens through which things get interpreted for the group?
- Whose voices are at the table? Whose are not?
- Who benefits from the way things are currently done?
- Who is hurt by the way things are currently done?
- Are differences celebrated or tolerated?
- What other questions do we need to ask?

Creating effective feedback loops

This essay provides a set of principles that practitioners can use to design feedback loops with a higher probability of success. It suggests that effective efforts benefit from getting constant feedback about what works and makes the case that the constituent voice (or consumer) is critical to design systems that are effective and responsive.

Culture

Setting goals to fully engage constituents often means exploring the organization's culture of power dynamics. Every organization, team, and community experiences elements of power which can be seen in the light of relational power, or power with someone or over someone, as well as the kind of power which comes from having influence in a situation.

Discussions about power may lead to an exploration of cultural proficiency, or how we value others, especially others who are different from us. One way we demonstrate how much we value others is in how we share power with them. How does power operate within the organization? What are the organization's assumptions about getting to goals? How do staff and leadership see their current culture and practice?

RESOURCES TO USE WITH THE AGENCY:

Case Study: Sources of Power: This case study is written from a consultant's perspective who was invited to work with an organization to increase its effectiveness working with communities of color. It follows the consultant through the process of identifying and working with a design team and engaging non-traditional departments for social change: fundraising and legal. It describes the questions asked and learning gained through the process.

HANDOUT | Sources of Power

This handout can be used with organizations working with constituents and in partnerships. It is helpful to understand the different ways that participation and communication styles can be perceived in groups, and encourages users to consider how to share power in order to establish trust.

Practice

Establishing awareness and setting goals helps challenge the assumptions we hold about how things operate. Learning together can spark new thoughts and feelings about how things work in the organization. Putting learning into practice is a continuous process. The consultant role here is to establish the foundation for iterative practice – learning, practicing, studying results and continuing to change and learn.

RESOURCES TO USE WITH THE ORGANIZATION

PDSA Cycle: The PDSA Cycle, or Plan, Do, Study, Act is a series of steps to gain knowledge for continuous learning. It was designed by W. Edward Deming for systems and management improvement and was adapted for use in the health care field and social services. It can be utilized in any situation where continuous learning is a goal.

Increasing Constituent Voice: This agenda and activity worksheet is designed to identify opportunities for constituents to have more voice and leadership in your organization and to generate a list of concrete practice shifts that can be proposed to others in the organization.

IMPACT | RESOURCES FOR THE CONSULTANT:

Measuring the Impact of Civic Engagement Tracking Outcomes in Health, Education, and Economic Security:
This report provides an overview of a process to develop tools to measure the impact of civic engagement practices in human services. The Civic Engagement Measurement System (CEMS) is an inter-related set of tools that are believed to represent a promising new approach to the measurement of outcomes and impacts in civic engagement.

Beyond Marketing: Becoming a Constituent Centered Organization
Maintaining change overtime requires using evaluation data to inform practice. This paper, while using "marketing" language, offers suggestions for long-term, mutually beneficial change. It suggests that being constituent-centered is as much a mindset as it is a set of activities. It gives examples and ideas to ensure that the organization is mindful of its constituents at all times—in all its activities, policies, and programs.

Impact

Service organizations are very often well-practiced in measuring outcomes about individual and/or family progress using an array of outcomes that are program related. It is common to ask if a "client" or constituent is better off as a result of services or program participation. It is less likely that organization measure the impact of constituent engagement in building the organization or in civic engagement activities. While the results of service provision are an important part of the organization's story, expanding the view to include the impact of constituent engagement contributes to long-term change beyond the individual.

RESOURCES TO USE WITH THE ORGANIZATION:

My Healthy Organization Assessment: This guide explains how to use the My Healthy Organization Tool (MHO Assessment Tool). The guide describes:

1. Why and when to do an assessment.
2. How to implement the process and use the assessment tool, including risks and challenges
3. How to use the process and results to improve your organization

   Nine areas are identified as important building blocks of movement capacity of nonprofit organizations: Vision, Principles, Learning and Reflecting, Issues of Race and Power, Work Across Boundaries, Work Across Generations, Constituent Involvement, Structure, and Funding.

Constituent Voice Feedback Systems: Constituent Voice™ is a methodology developed by Keystone Accountability to enable organizations to improve results by optimizing their relationships with their constituents. Steps are 1) Designing; 2) Collecting; 3) Analyzing; 4) Closing the loop; 5) Course correcting

Feedback Loops: The purpose of this guide is to help organizations create a framework for developing strategies, building partnerships, planning interventions, gathering evidence of success or failure and, most importantly, analyzing and learning from this evidence through open dialogue among constituents and stakeholders who have a real interest in change.