Part III of the Tools to Engage Webinar Series

SparkPoint Contra Costa: Deeper Dive into Advocacy

Building Movement Project

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Agenda

- Introduction
- What is the Tools to Engage Webinar series?
- **Tool**: SparkPoint Contra Costa: Deeper Dive into Advocacy
- **Application**: Integrating Social Service and Social Change
- Questions and Answers
- Additional Resources

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Today’s Presenters

Betty Geishirt Cantrell
Director
SparkPoint Contra Costa

Judi Sherman
Project Consultant
Judi Sherman & Associates

Noelia Mann
Communications & Operations Coordinator
Building Movement Project
Poll Question: Please select the type of organization you work for.

- Nonprofit Service Organization: 50%
- Other nonprofit: 15%
- Self-Employed: 10%
- Other: 10%
- Foundation: 5%
- Nonprofit Intermediary Group: 5%
- For profit: 5%
- Nonprofit: 5%
Poll Question: Please select the title that best fits your current role.

- Organizational leader: 41%
- Organizational staff: 32%
- Constituent (client, resident, community member, program participant): 4%
- Capacity builder (outside of the organization): 14%
- Capacity builder (internal to an organization): 9%
ABOUT THE BUILDING MOVEMENT PROJECT

Leadership
Analyzing how organizations can do their best work by promoting the most effective and inclusive practices
- Reports
  Race to Lead: Confronting the Nonprofit Racial Leadership Gap
- Blog
  The Leadership in Leaving
- Reports
  Vision for Change

Service and Social Change
Developing the capacity of organizations to engage constituents in changing the systems that impact them
- Tools
  Service and Social Change
- Blog
  Small Shifts, Big Change
- Reports
  Crossing Organizational Boundaries to Build New Partnerships

Movement Building
Acknowledging and building on the distinct role of nonprofit organizations in advancing movements for social change
- Reports
  The Respect ABQ Women Campaign
- Blog
  Learning How to ACT UP
- Blog
  Detroiters Reclaiming Voice and Power

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Welcome to Tools to Engage: Resources for Nonprofits

Tools to Engage: Resources for Nonprofits, Compiled by the Building Movement Project
What is the **Tools to Engage** Webinar Series?

- **Tools2engage.org** is our new website, full of research, resources, and tools from across the social sector to help organizations align their principles and practices.

- It’s the latest iteration of a body of work we’ve been developing for about 15 years focused on **supporting direct service organizations** to more actively and meaningfully engage constituents.

- The **webinar series** highlights the innovative ways various groups across the country integrating constituent engagement into their organization’s work, culture, and values.

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What We Believe

■ People **can** and **want to** transform their inner lives and regain the **power** and **voice** that is too often taken away by outer circumstances.

■ **All of us** rely on services and supports to thrive and contribute fully to society – whether they are **visible or invisible**, formally or informally provided.

■ A **combination** of individual **empowerment** and collective **action** can transform our communities and society to produce **lasting change**.
Tool: Deeper Dive into Advocacy

A Case Study on a Service Provider’s Bold Shift to Social Action
What is the Family Economic Security Partnership

A public, private and nonprofit collaborative:

_dedicated to addressing poverty and increasing the income and assets of low-income families and individuals living in Contra Costa County_
Why Policy Advocacy and a Deeper Dive?

- Raise awareness about the root causes of poverty
- Direct services are important but not enough
- Promote financial stability policies
- Build a group of champions
- Increase direct service agency staff and constituent engagement in policy work
The Deeper Dive Pilot Project Goals

INCREASE

Understanding of root causes of poverty
Understanding of interconnection of services, systems, policy
Knowledge of policy advocacy strategy
Constituent power

Create a Learning Circle of agencies and/or constituents to foster further learning and policy engagement
The Deeper Dive Project Begins

SparkPoint agreed to act as the Pilot agency

FESP received funding from: T.J. Long Foundation, Y&H Soda Foundation and the East Bay Community Foundation

FESP engaged BMP to facilitate the process

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SparkPoint brings together the best experts to provide services in a way no one organization could do on its own.
Building a Pilot Project Team

SparkPoint Director
SparkPoint Site Coordinators (4)
Direct Service Staff
Steering Committee Member
SparkPoint Constituent
FESP Coordinator
BMP Consultant

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## Deeper Dive Project Plan

<table>
<thead>
<tr>
<th>Month One</th>
<th>Month Two</th>
<th>Month Three</th>
<th>Month Four</th>
<th>Month Five</th>
<th>Month Six</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft goals and agree on survey</td>
<td>Analyze survey results and plan presentation</td>
<td>Share results and gather input from Steering/staff</td>
<td>Develop an action plan based on feedback</td>
<td>Adopt plan and plan FESP presentation</td>
<td>Present plan and process to FESP</td>
</tr>
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Focus of the Survey

SparkPoint Contra Costa

- Structure
- Constituents
- Barriers
- Activities
Definition of Advocacy

“Direct engagement with policy makers and elected officials, as well as supporting constituents to have more voice and power over decisions that affect their lives”
Types of Advocacy

- Research and analysis
- Community organizing
- Partnering
- Messaging
- Media relations
- Influencing decision-makers
POLL QUESTION: Which best describes the type of advocacy your organization or organizations you work with conduct?

- Influencing decision-makers: 28%
- Partnering: 32%
- Messaging: 8%
- Community organizing: 16%
- Research and analysis: 16%
Constituent Engagement Activities

- Education
- Input and Feedback
- Civic Engagement
- Leadership Development

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Poll Question

In which area of constituent engagement do you feel your organization has the most room to grow?

- Leadership Development: 17%
- Civic Engagement: 16%
- Education: 46%
- Input and Feedback: 21%

In which area of constituent engagement do you feel your org is the strongest?

- Leadership Development: 42%
- Civic Engagement: 33%
- Education: 4%
- Input and Feedback: 21%
Who responded to the Survey?

- Surveys were collected from September 12 to 20, 2016
- 58 People were invited to complete the survey
- 36 People Completed the Survey

(1 partial response)
The Mission of SparkPoint

<table>
<thead>
<tr>
<th>Description</th>
<th>Percent</th>
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</thead>
<tbody>
<tr>
<td>SparkPoint has no formal mission statement</td>
<td>29.7%</td>
</tr>
<tr>
<td>SparkPoint has a mission but I’m not sure what it is</td>
<td>5.4%</td>
</tr>
<tr>
<td>SparkPoint’s mission addresses individual client needs</td>
<td>24.3%</td>
</tr>
<tr>
<td>SparkPoint’s mission addresses client needs and identifies issues facing the broader community</td>
<td>16.2%</td>
</tr>
<tr>
<td>SparkPoint’s mission addresses client needs and the underlying root causes of problems facing our clients/communities</td>
<td>24.3%</td>
</tr>
</tbody>
</table>
Why has SparkPoint not engaged in Advocacy Activities?

Our clients / constituent are not interested
SparkPoint leadership is not interested
This work is not within our mission
We don't have the necessary skills and expertise
We lack adequate funding / resources
We don't have the time
It is not permitted under 501(c) (3) status
I don't know

Not Selected:

- Our steering committee members are not interested
- We are afraid of losing funding / resources
- I don’t think we’d have an impact

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What increased or new capacity would most help advance SparkPoint’s advocacy efforts?

- 60% - Community Organizing
- 60% - Partnering
- 50% - Messaging

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How to increase Constituent Engagement?

- Information sharing
- Encouraging voting
- Advocacy campaigns
- Leadership Development

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Emerging Priorities

• Articulate mission that includes advocacy
• Train staff
• Increase constituent and community engagement

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Social Action Plan Development

Goal #1: Create a new mission to guide both our service provision and advocacy work

- Who
- Context
- Activities and Strengths
- Benchmarks for success
We partner with agencies to empower individuals and families to become financially sustainable and advocates for social change.
Goals of the Deeper Dive (continued)

■ Staff Development for Advocacy
  – What are desired competencies
  – Learning from partners

■ Empowering Clients
  – Question on consent form
  – Training and presentation to legislators
What We Learned...

• Individual vs. policy advocacy
• Client engagement and advocacy are important
• Partnering is key
• Working across sites was beneficial
• Small changes matter
• Mindset shifts
Tips and Tools

- A diverse team
- Strong leadership
- Organizational readiness
- A well-designed survey
- Continuous reflection

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QUESTIONS AND ANSWERS
Allowable Advocacy Activities for 501(c)(3) Agencies

- Organize Communities
- Educate Public
- Nonpartisan Voter Ed.
- Change Corporate Behavior
- Educate Legislators
- IRS Lobbying Exceptions
- Influence Regulations
- Encourage Voting
- Educational Conferences
- LOBBYING
- Leadership Training
- Litigation

- Research
- Can do within specified limits; measurable under the 510 (h) expenditure test

Resources from BMP

social service and social change: A Process Guide

Nonprofits Integrating Community Engagement Guide

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A Series of 5% Shifts

- Building Community from the Inside Out
- Developing the Leadership of Recipients
- Asking Powerful Questions
- Advancing Community Level Impact
- Crossing Organizational Boundaries to Build New Partnerships

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Poll Question: What would be most helpful to you in strengthening your practice around client/constituent engagement?

- An opportunity to hear lessons learned from other communities of practice (13%)
- An opportunity to participate in a community of practice (26%)
- Case studies and white papers on meaningful constituent engagement (13%)
- More webinars like this one (17%)
- Training around constituent engagement for my clients/team/the people I work with (31%)
Thank you!

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Questions? Comments? Want to learn more?
Contact nmann@buildingmovement.org