WELCOME

The Webinar Will Begin Soon

We hope to minimize technical difficulties, but please bear with us if the screen freezes during the webinar.
Nonprofits Integrating Community Engagement

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Today’s Agenda

- Background on constituent voice and community engagement
- The purpose and structure of the NICE Guide
- Application and examples: Focus on one community
- Question and Answer
Why Service Agencies and Social Change?

ASSUMPTIONS

• Services are critical for all communities
• Service agencies have unparalleled reach into low-income communities
• Service providers understand systemic and structural barriers
Role of Consultants & Origins of this Work

“I see her as our conscience. She has a very committed stance, and she’s consistent, and committed. Just her presence. Sometimes I think, what will Linda think about this?”

-- Service Provider in Detroit
“Without beating me up, she would challenge my comfort zone ... She would tell you that she honors what you were doing, but have you ever thought of taking it one step further.”

-- Service Provider in Detroit
**NICE Theory of Change**

**Mission**
Help nonprofit organizations transform individuals and communities to produce lasting change

**Assumptions**
- Service agencies are too often overlooked as sites of social change / justice work
- All communities rely on services - visible or invisible, provided formally or informally
- Service agencies have unparalleled reach into low-income communities
- Service providers understand systemic and structural barriers

**Target Groups**
- Service providers looking to integrate social change practices
- Organizational development experts who support change and transformation of service agencies

**Outcome**
Community engagement becomes best practice

**Strategies**
OD experts help service organizations → individuals regain voice and power → collective action
NICE Development

100+
Tools from advisors and the internet

TWELVE
Advisory group members from ANPM and other consultants

TWO
2015 Alliance Conference Workshops

DECEMBER 2015
GUIDE development and dissemination
NICE Guide OVERVIEW

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<th>TYPES OF ENGAGEMENT</th>
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<td>Coordination, Collaboration, Collective Impact</td>
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## Framework

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<tr>
<td>• Exploring values and beliefs about power</td>
<td>• Train on and lead participatory action research</td>
<td>• Constituent engagement in Collective Impact</td>
<td>• Nonprofit lobbying</td>
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<td>• Constituent feedback loops</td>
<td>• Conduct Learning Circles across organizations</td>
<td>• Connecting organizations</td>
<td>• Raising systemic issues and root cause analysis</td>
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<td>• Constituent training</td>
<td>• Community Asset Development</td>
<td>• Capacity building for backbone orgs.</td>
<td>• Connecting organizations to policymakers</td>
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Guide Organization

- Section 1: Introduction to Core Concepts, Values and Terms
- Section 2: Readiness
  - Background reading for consultants
  - Assessment tool for organizations
- Sections 3, 4, 5 and 6: Doing the Work
  - Why This Matters
  - Initial Assessment
  - Theory of Change
  - Culture Change
  - Practices to Explore / Adopt
  - Impact (visioning and evaluating)
Readiness

SECTION ONE:
Readiness

Ready Consultant

This Guide acts as a “toolkit” for consultants working with nonprofits towards individual and social change. It offers detailed information, resources, and case studies for what you need to know as an internal or external consultant helping with the change process. There are several fundamental principles that help consultants understand what it means to lead social change work. These include:

1. Relationship building with constituents based on respect and a strengths-based approach is a best practice in effective organizations.

2. Creating a learning environment is primary to advance knowledge and spark action.

3. Using their skills and strategies, consultants can help nonprofits to work both within and organizations, and across sectors to make needed change.

4. Understanding that social change efforts are long-term requires groups look at the incremental steps they can take.

5. Believing in individual change is key to facilitating the change process.

Ready organization

Part of the consultant’s work with organizations is to assess how ready groups are to become involved in the constituent and community engagement process. The Readiness Assessment is designed to help organizations explore the status of their vision and mission, their relationship to staff partners, and constituents, and their leadership approach as part of an organizational culture conducive to social change efforts.
A key resource for Social Change action planning

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Our Transformation Process

1. Learning
   - Identify the issues
   - Form learning group(s)
     - Designate time
     - Decide on curriculum
     - Communicate results

2. Awareness
   - Identify structures of power
   - Learn how structures operate
     - Include role for constituents

3. Vision
   - Identify the world we want to create
   - Set long-term goals
   - Identify the role of constituents
     - Identify values and beliefs

4. Strategy
   - Identify the best way to enact our mission and vision:
     - Determine our analysis
     - Develop our goals
     - Identify our partners
     - Identify what results we expect to achieve

5. Action
   - Put strategy into place
   - Measure the outcomes
   - Work with constituents
   - Institute principles

6. Reflection/Evaluation
   - Identify results: What worked? What didn’t?
   - Ask, “Should we change our strategies?”
   - Ask, “Should we change our analysis?”

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Constituent Engagement

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 interrelated 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 over time requires using evaluation data to inform practice. This paper, while using “marketing” language, offers suggestions for long-term, mutually beneficial change. It is that being constituent-centered is as much a mindset as it is a set of activities. It gives the organization is mindful of its constituents at all times—in every interaction.

**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 (M-H.O 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 Pace 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 those who have a real interest in change.
Constituent Engagement

• "How-to" guides to help create a framework for open dialogue with constituents and stakeholders

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Partnering with Community

Initial Assessment for Partnering with Community

The simple assessment shown here is meant to (1) help the organization determine readiness to explore partnering with their community, and (2) spark thinking about where to begin and what goals to develop. The tool consists of statements that describe constituent role in the community and how the organization relates to the community. 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 partnering with the community.
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.

<table>
<thead>
<tr>
<th>Constituent</th>
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<tr>
<td>A. We work with the constituents of our services only</td>
<td>A. The organization focuses on our staff, clients, and volunteers</td>
</tr>
<tr>
<td>B. We encourage constituents to bring family and community members to the organization</td>
<td>B. Staff participate in the community (such as local events and celebrations)</td>
</tr>
<tr>
<td>C. We visit constituents’ homes to meet them in context</td>
<td>C. Community members can use the organization’s facilities for events and meetings</td>
</tr>
<tr>
<td>D. We meet constituents in the community</td>
<td>D. Staff are encouraged to attend community events, meetings, and discussions</td>
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RESOURCES TO USE WITH THE ORGANIZATION:

Asset Based Community Development: Asset Based Community Development is a strategy to link individual and community assets to the larger change initiatives so that communities can drive the development process by identifying and mobilizing existing, but often unrecognized assets, and thereby responding to and creating local economic opportunity. This website is a link to Asset Based Community Development resources. It provides talking points, asset mapping tools and facilitation tools. In the context of assessment, the approach uses a capacity inventory rather than a “needs” assessment to identify assets within the community that may not be obvious or useful to residents.

Goals and Theory of Change

As a result of the previous assessment(s), goals will begin to emerge about partnering with the community that will set the stage for determining strategic direction and the action necessary to accomplish those goals. The Theory of Change (TOC) is a method or technique that can assist communities to think about, plan and evaluate their work. Resources for TOC are listed in the Introduction Section. This section includes suggestions for specific goals and outcomes relating to Partnering with Community. Preparation for either approach requires several things:

- Agreement about when to embark on the process and who to involve
- A clear understanding of the time and resources required
- A clear understanding of how to work with individual or small group that will work with the community group process to integrate ideas
Mobilize community resources and gather information to inform priorities and decisions
Goals and Theory of Change

The general goal of collaboration is to bring together individuals, agencies, organizations and community members in an atmosphere of support to systematically solve existing and emerging problems that could not easily be solved by one group alone. Collaboration should focus on increasing capacity, communication and efficiency while improving outcomes.

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This section includes suggestions for specific goals and outcomes relating to collaboration. Preparation for either approach requires several things:

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?
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 will they get out of participating in the TOC design?
4. How can we gather information from them?
5. How can we get them to participate?

Sample Goals and Outcomes:

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

- Advocate to include constituent voice when making referrals to other organizations
- Engage constituents in collaborative efforts
- Establish forums to share with constituents and communities public knowledge
- Effective communication systems between and among collaborative partners

Questions for Reflection:

There are several questions to pose for reflection as the organization moves toward goal setting:

- What is the readiness level of the organization to collaborate with others?
- Why forces are moving the organization towards collaboration?
- What exists within the organization that supports collaboration? What factors are barriers to collaboration?
- What staff commitments are necessary? Are organizational structures in place that support collaborative efforts (e.g. staff job descriptions that identify tasks involved in collaborating)?
- What coordinating mechanisms does the organization need to ensure that collaboration is effective? This might include shared intake, shared information, regular meeting technology, systems for share data.

Community Democracy Workshop: The Kettering Foundation hosted the Community Democracy Workshop that explored issues relating to community collaboration. Included were: assumptions and beliefs about learning and knowledge building; the various approaches to community engagement; and, the relative value and effectiveness of these approaches to advancing community democracy. These notes from the meeting provide a structure for delving into these issues and can be adapted for working with any organization.

Nonprofits Integrating Community Engagement (NICE) Guide
Putting Community in Collective Impact

This article makes the case for including community in cross-sector, high impact efforts from the perspective of Collective Impact. It includes questions for consideration and could be used to spark a goal setting session.

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**RESOURCES TO USE WITH THE AGENCY:**

**The Power of Stories**

This webpage has a link to a video that describes the cultural treasures of one community in California. The video highlights youth working for change and developing leadership through civic engagement and advocacy.

**Where I Found Role Models Who Look Just Like Me**

This motivating story by a youth leader can be effective to spark conversation about engaging often overlooked constituents for leadership roles. After reading and viewing, the organization might discuss possibilities for its marginalized populations and opportunities to learn from them and open doors to leadership.

**Practice**

The tools for this section focus on building organizational knowledge and capacity to engage in social change and to expand leadership capacity of constituents as allies. Organizations that have the tools to conduct root cause analysis, have the knowledge about the rights and limits of advocacy activities and have the ability to promote civic engagement as a key for leadership will see their work as a part of the spectrum that includes direct community action.

**RESOURCES WHEN WORKING WITH THE ORGANIZATION:**

**Root Cause Analysis**

**Causes and Consequences**

These tools are used to conduct a root cause analysis and to explore issues that staff and constituents deal with for the discussion.
Vote with Your Mission
Campaign Kit

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**Client Feedback**

helps organizations get answers to specific questions.

1) How would you rate our programs?
2) Are they making a difference in your life?

**Participant Engagement**

asks participants for their expertise and engages them as decision makers. This helps ensure they’re getting the services they really need, and invites them to be partners in creating social change.
Overview

Figure out the systems and structures that need changing

Share power with participants

Organize around long-term outcomes
Practical Application: New Mexico

- CONSTITUENT ENGAGEMENT
- Learning Circles
  Page 26
- NICE Guide

Leah Steimel, MPH
Fourfold Partners
Albuquerque, NM
A cohort of seven non profit agencies

- Survey
- Ask meaningful questions
- Clarify areas for change
- Create a Social Action Plan
- **Participate in a Learning Community**
- Convene to finalize plans
Learning Circles for Root Cause Analysis

This handout provides information and a process to engage staff and constituent partners in learning circles focused on root cause analysis.

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QUESTIONS?

Please type your question into the Chat screen.
Please make “All Panelists” the recipient of your Chat.
THANK YOU!

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