

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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About This Partnership



ALLIANCE
for Nonprofit Management



Building Movement Project

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?

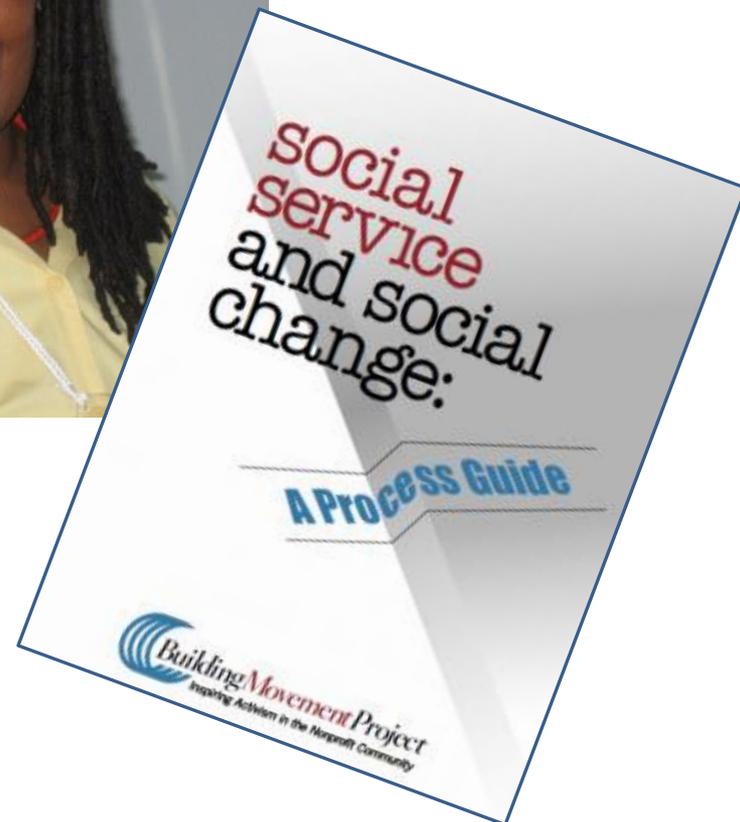
ASSUMPTIONS

- 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

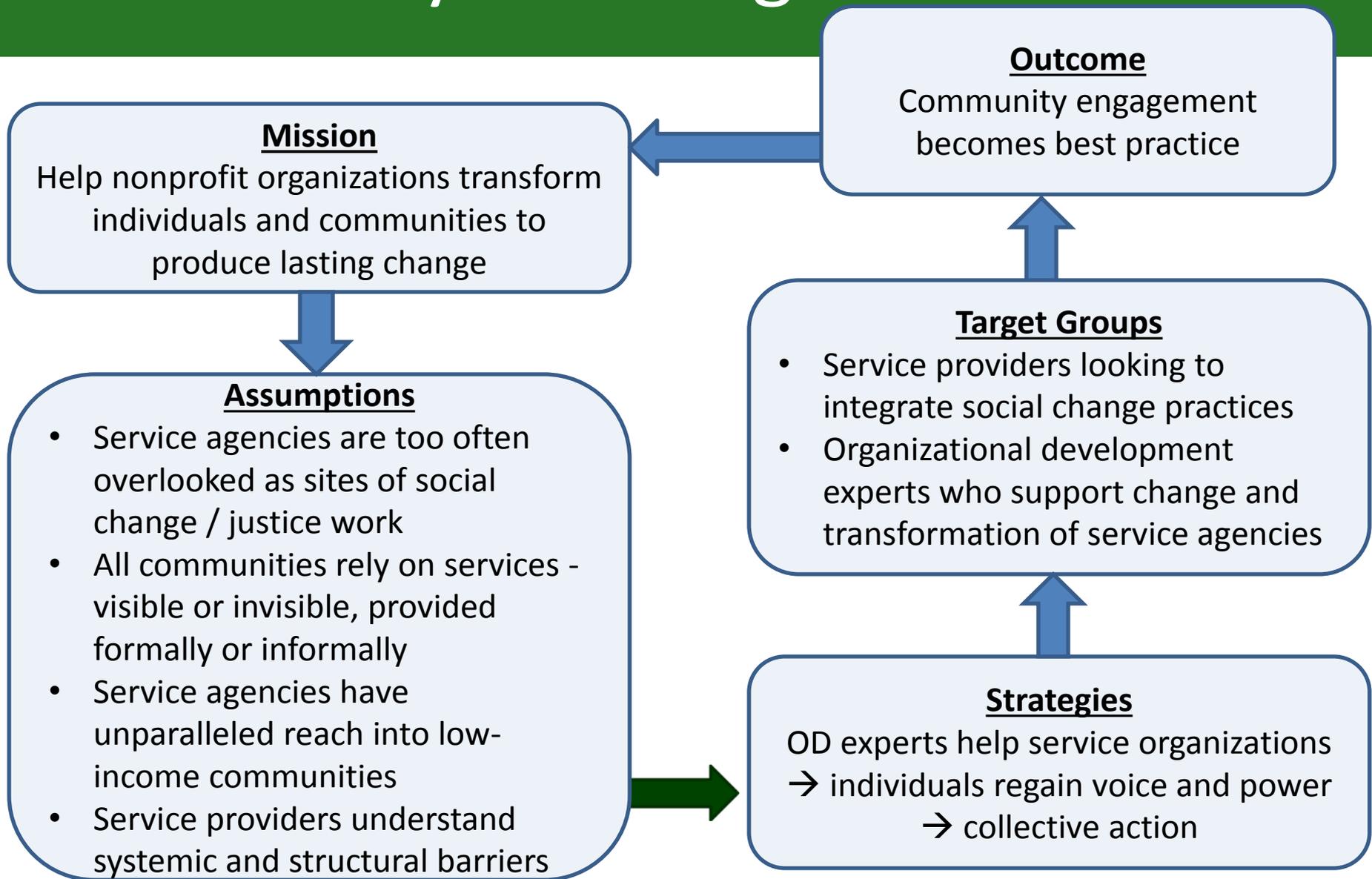


One Step Further...with Consultant Support

“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



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

TYPES OF ENGAGEMENT

Constituent
Engagement

Partnering with
Community

Coordination,
Collaboration,
Collective Impact

Social and Systems
Change

Framework

					TYPES OF ENGAGEMENT				
					Constituent Engagement	Partnering with Community	Coordination, Collaboration, Collective Impact	Social and Systems Change	
Potential Intervention					<ul style="list-style-type: none"> • Exploring values and beliefs about power • Constituent feedback loops • Constituent training 	<ul style="list-style-type: none"> • Train on and lead participatory action research • Conduct Learning Circles across organizations • Community Asset Development 	<ul style="list-style-type: none"> • Constituent engagement in Collective Impact • Connecting organizations • Capacity building for backbone orgs. 	<ul style="list-style-type: none"> • Nonprofit lobbying • Raising systemic issues and root cause analysis • Connecting organizations to policymakers 	

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 transformation process.

RESOURCES FOR THE CONSULTANT:

Movement Capacity Building

This fact sheet from BMP highlights some key differences between capacity building for organizational sustainability and capacity building for social change. It identifies nine areas identified as important building blocks of social movement capacity for nonprofit organizations.

Social Service to Social Change: A Process Guide

In 2006, the Building Movement Project published *Social Service to Social Change: A Process Guide* for staff and board members of nonprofit service organizations to learn to incorporate social change values and practice into their work. While it has many activities that will be referenced in subsequent sections, understanding the "Transformation Process" on page nine is foundational to making lasting change.

Developing a Learning Culture in Nonprofit Organizations

Viewing organizational learning as a key to long-term change and individual improvement, author Stephen J. Gill published *Developing a Learning Culture in Nonprofit Organizations* in 2010. This online publication is very readable and contains many tools and resources.

The 5th Discipline

Peter Senge's, *The Fifth Discipline*, was published in 2006 to focus on group problem solving and organizational learning. This link to the Change Forum provides a summary of the concepts and access to the book.

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 as a tool 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.





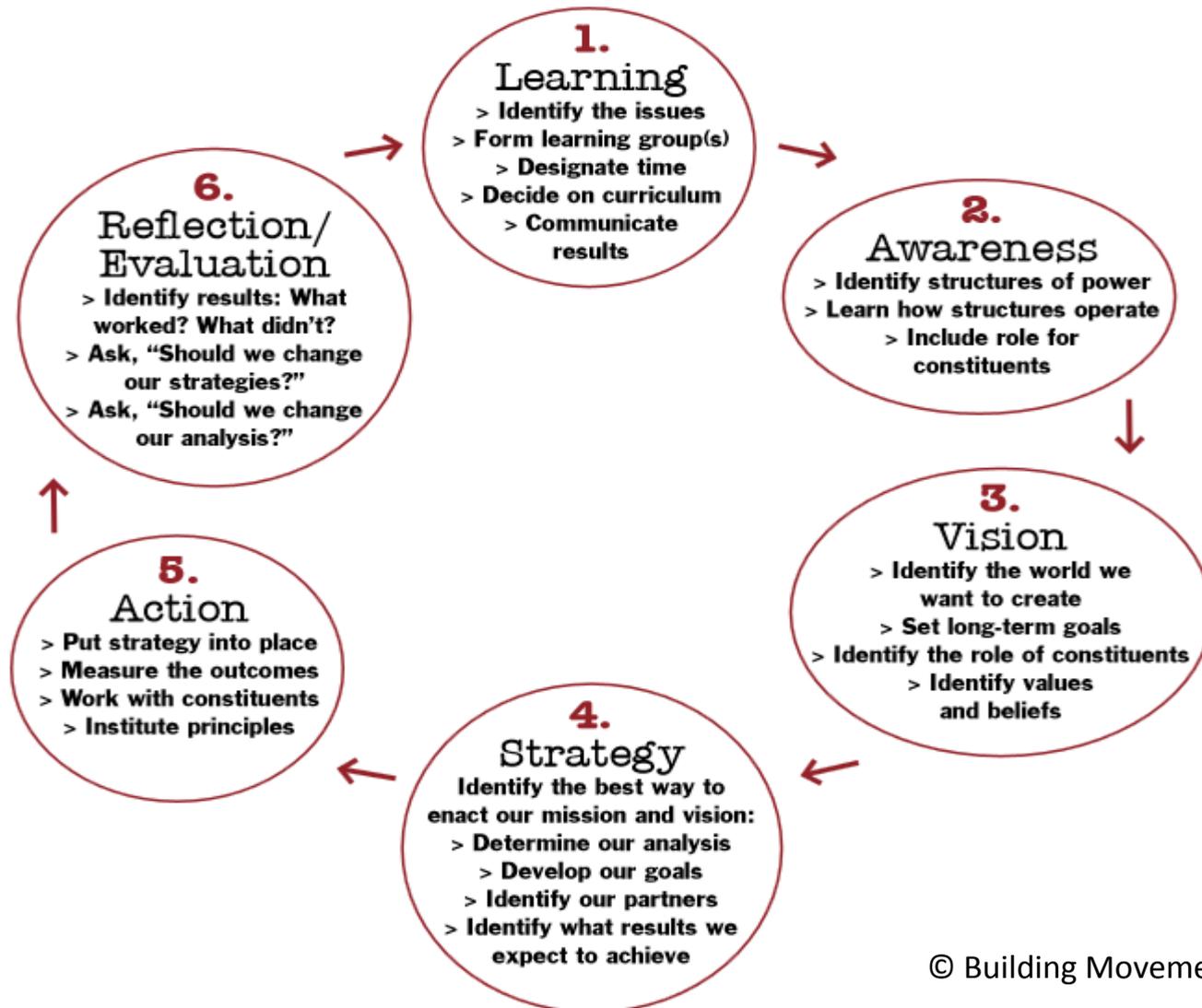
Readiness

A key resource for Social Change action planning

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Our Transformation Process





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

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 those who have a real interest in change.



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 of how an organization is mindful of its constituents at all times—in



Constituent Engagement



- "How-to" guides to help create a framework for open dialogue with constituents and stakeholders
- **Page 12 NICE Guide**



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.

Constituent	Organization
A. We work with the constituents of our services only	A. The organization focuses on our staff, clients, and volunteers
B. We encourage constituents to bring family and community members to the organization	B. Staff participate in the community (such as local events and celebrations)
C. We visit constituents' homes to meet them in context	C. Community members can use the organization's facilities for events and meetings
	Staff are encouraged to attend



RESOURCES TO USE WITH THE ORGANIZATION:

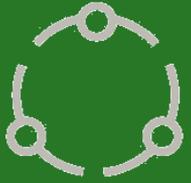
Asset Based Community Development: Asset Based Community Development is a strategy to link individual and community assets to the larger change initiatives so that communities can drive the development process by identifying and mobilizing existing, but often unrecognized assets, and thereby responding 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
- An individual or small group that will work with the community change group process to integrate ideas

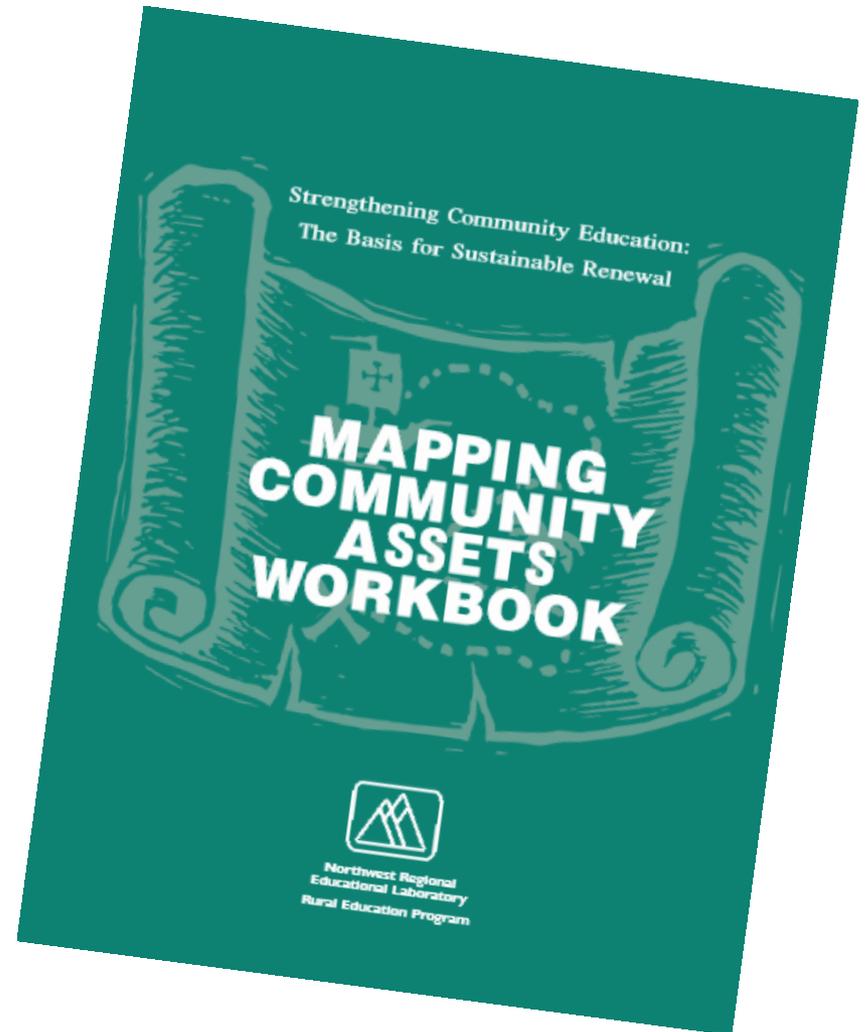




Partnering with Community

Mobilize community resources and gather information to inform priorities and decisions

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Coordination, Collaboration, Collective Impact

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

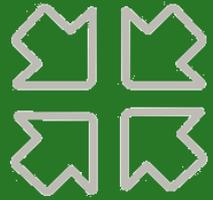
Questions for Reflection:

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.





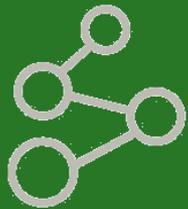
Coordination, Collaboration, Collective Impact



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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Systems and Social Change

Nonprofits Integrating Community Engagement (NICE) Guide



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 two activities are used to conduct a root cause analysis and to explore causes of issues that staff and constituents deal with. They are also used to set the agenda for the discussion.

PRACTICE | RESOURCES FOR THE CONSULTANT:

Learning Circles for Root Cause Analysis

This handout from BMP offers information and a process to engage staff and constituent partners in learning circles focused on root cause analysis. It describes how to organize the learning circle, set it up for success and provides tips for the facilitator.

Nonprofits Must Speak Out about Poverty and Income Inequality

This paper makes the case for nonprofits to work to ameliorate income inequality beyond providing services to those who are already poor or are in danger of falling out of the shrinking middle class and into poverty. The author suggests several strategies and offers a case study that could be used to explore possibilities within the organization.

Deriving Power from Constituents

Nonprofits that look to their constituents for leadership and direction can change the structure and governance of the organization. This case study describes a move to build leadership within the organization that not only reflects the community it served, but to become that community. In this way, the leaders of the organization and of the community were the same, and thus able to address the root causes of the conditions that acted as barriers to change.

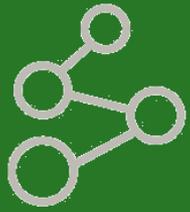
Nonprofits and Lobbying

This document provides the lobbying rules for nonprofit, 501(c) (3) organizations. Contrary to popular belief, nonprofits can "lobby freely" if they follow the rules included here. This opens up many possibilities for advocacy and engaging legislators and policy makers around issues impacting local conditions.

Vote with your Mission Campaign Kit

Materials provided by California Nonprofits, help organizations promote voting. Nonprofits use voting power, they will see more success in achieving their goal is...





Systems and Social Change

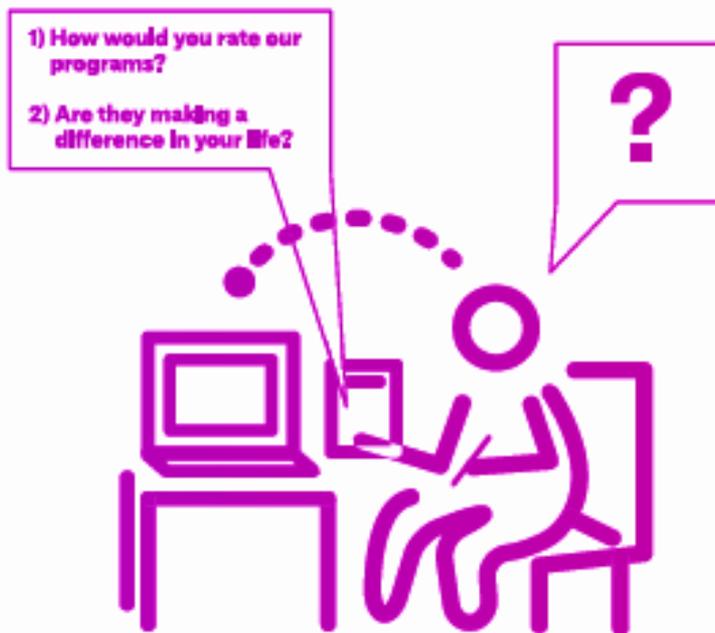
Vote with Your Mission Campaign Kit

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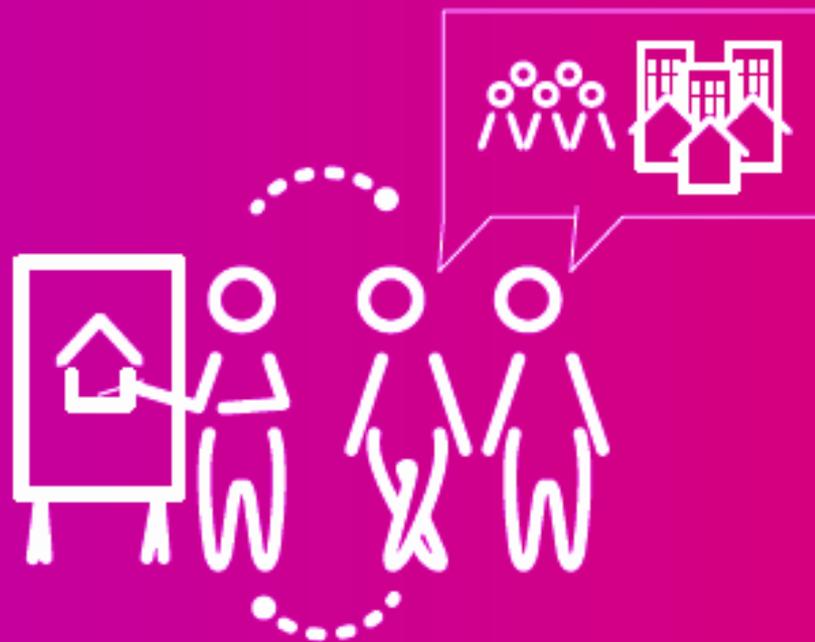
Client Feedback

helps organizations get answers to specific questions.



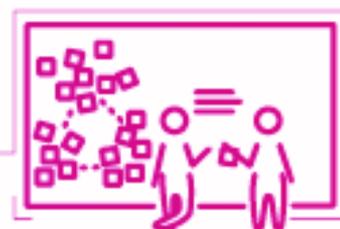
Participant Engagement

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

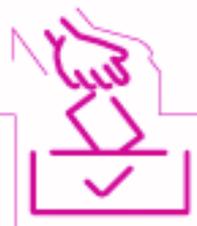
Figure out the systems and structures that need changing



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



New Mexico Common Good

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.

NICE Guide

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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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