

Case Study:
Developing Board Readiness for Advocacy
Habitat for Humanity of Colorado



Introduction

In 2004 Habitat for Humanity of Colorado (HFHC) hired a new executive director, Stefka Fanchi, who found a deeply-entrenched resistance among the Board of Directors to advocacy activities. This resistance was held despite a national push from the group’s parent organization to become involved in public policy. Specifically, the Board remained deadlocked in 2006 and could not take even the smallest steps forward on a proposal to support – in name only – a statewide initiative that directly affected the organization’s mission.

For many organizations, structural change is full of minefields and needs a steady and collaborative push behind it. Research has shown that service providers, in particular, are vastly more likely to move toward advocacy when they have strong leadership from a vocal proponent.¹ Ms. Fanchi’s executive leadership brought a different perspective and filled this critical role at HFHC. She recognized the need for change immediately, yet appreciated it as a long-term process. She committed to a consistent message over time, which created a climate for organizational evolution rather than a coup. The organization’s support of advocacy took three years to fully achieve, and only came after a transition of the governance model.

Background

HFHC is a nonprofit corporation (501(c)(3) formed in 1992. Its purpose is to build the capacity of its affiliates by increasing access to resources, facilitating communication between affiliates and the community, and providing statewide leadership toward the creation of thriving communities that support healthy families. Over the years, the 30 Habitat for Humanity affiliates across the state have built more than 1,200 homes in partnership with low-income families who would otherwise be unable to obtain the security, stability, and hope that homeownership can provide. HFHC supports local affiliates through the development of statewide funding and finance opportunities, the provision of high-quality training and technical assistance, the creation of strategic partnerships, and the support of public policy that creates a climate of success for its affiliates, partner families, and mission.

¹ “Making Social Change: Case Studies of Nonprofit Service Providers.” Building Movement Project.

Organizational Structure as a Barrier

HFHC is a supportive association of direct service agencies who, individually, focus on the construction of homes and support of partner families. In many ways, HFHC's organizational structure is ideal for advocacy work, as it can more easily view the statewide landscape for its member organizations, and can provide a "safe distance" for the local affiliate organizations from the occasional heat of lobbying. However, when Ms. Fanchi joined the organization, HFHC's existing governance structure made it impossible to move forward and make important organizational decisions in many areas. The Board consisted of 40 members: 30 entitlement seats for local affiliates with no term limits, and 10 at-large positions. This governance model hindered the positive elements of the organizational structure. Decision-making was slow, board conflicts were plentiful, and state-level public policy expertise was thin on the Board.

Making the Case for Advocacy

HFHC's bold mission is to "eliminate poverty housing." This mission inherently necessitates a public policy voice and focus. The state-level association has different leadership needs than local affiliates, and the need to bridge this divide became apparent through HFHC's organizational change process. To maintain the affiliate ownership of the state organization, it was critical to retain affiliates' voting power to confirm new Board members, who ultimately decided public policy endorsements. HFHC was restructuring its Board selection process and removing affiliates' entitlement seats on the Board, and affiliates felt like they needed reassurance they would still have a voice. Affiliates felt the need to maintain a strong stake hold on public policy and organizational management, and this conversation came up over and over through the organization's advocacy and policy evolution.

HFHC leadership also built advocacy buy-in by reminding stakeholders of the power of the Habitat for Humanity brand. The widely recognized name holds influence and power with decision-makers. This power also requires organizational responsibility to put influence behind advocacy efforts that directly further the mission, and brought up the need for safeguards to ensure responsible use of the brand and organizational name.

Resourcing Advocacy Efforts

Funding is often a primary concern for service providers looking to incorporate advocacy into their work. Often funders have grown comfortable with providing resources for one area of work (i.e. direct services) and have trouble seeing the added value of helping service providers deepen their impact in a community through systems change work. From the provider end, there are also often concerns that advocacy work may signal a 'mission creep' and alienate funders.

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This common fear is present at the Board and staff level of many Colorado service providers. “Losing funding is a very valid concern,” says Ms. Fanchi. “But if our desire to please people supersedes our drive to pursue our mission, then we are not doing our job. We look at our funders as true partners, and were confident they would walk with us as we took on our mission from one more front.”

In the case of HFHC, however, encouragement from funders actually played a critical role in promoting the shift toward advocacy. Habitat for Humanity International, a key funder of state and local affiliates, placed a priority on advocacy as a part of their mission. Locally, Federal Home Loan Bank and Community Banks of Colorado sponsored advocacy events. This leadership among funders helped quell fears that HFHC would alienate funders by taking on advocacy work.

Contagious Leadership

The leadership of one strong individual can be an important catalyst for moving service providers toward advocacy. However, passion for and belief in advocacy must ultimately spread through all levels of the organization. One leader cannot accomplish it all, but can inspire others to help carry the ball. Key allies on the existing HFHC Board took up the cause for structural change as well as for the need to take on advocacy, while champions within affiliate organizations carried the message and quieted fears before they arose.

Some key lessons about leveraging leadership Ms. Fanchi learned along the way include:

Make spaces to share concerns and have others make the case:

- The six-member Executive Committee, affiliates, and staff each received a chance to voice concerns and reflect upon how advocacy could help boost the organization’s mission. When the advocacy issue was brought to the Board, wary individuals had already been included in preliminary conversations, and had opportunity to voice their concerns in more intimate settings.

Build deep relationships with key allies:

- In particular, Ms. Fanchi had separate conversations with the Board President, recruiting him as an active proponent of both structural change and of advocacy work as an organizational priority. The two leaders then fostered many of the same conversations with various audiences in smaller groups.

Utilize the snowball effect:

- With advocacy development, Ms. Fanchi notes that leadership often snowballs. The more new leaders took up the challenge, the more others followed and shared opinions within

their own circles of influence. HFHC’s growing “coalition of the willing” helped develop champions on the Board.

Prioritize buy-in over consensus:

- Ultimately, HFHC never came to full consensus to create and strengthen its advocacy focus, or to transform the Board itself. Two individuals held out in the process and voted against taking on public policy. One individual ran for the newly structured Board and was not selected by the 30 statewide affiliates, and the other individual later left the Board due to other time commitments. “Building buy-in for change is critical, but consensus is not always possible,” says Ms. Fanchi. “Waiting for consensus can stifle an organization’s potential for progress.”

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Managing the Change

After HFHC made a clear decision to support and lead advocacy efforts, staff and Board realized the need to provide clear, open, and consistent communication to all those affected. This includes current Board members, potential new board members, affiliate leaders, and staff. Ms. Fanchi says that consistent communications can help avoid unease with change.

HFHC’s organizational shift also created a more conducive climate for staff and Board to utilize existing leadership skills. The organization now makes participation in advocacy a clear expectation to new Board members. This transparency and strong stance is critical for continuing to build organizational policies that make advocacy a part of daily operations: developing an annual legislative agenda process, fostering a government relations committee, and integrating advocacy into the overall strategic plan. For HFHC, advocacy efforts are explicitly stated in the strategic plan.

The organization also expanded other core programs to support the shift into advocacy. Staff now hosts an annual Legislative Luncheon, and an annual “Habitat Builds Colorado” Day during which elected officials and decision-makers join volunteers at work sites and help build homes. Lastly, once HFHC took advocacy on, staff committed to providing training and technical assistance to the Board and affiliates. Much of the organization’s training and technical assistance work entails providing a consistent flow of information, gaining input, and empowering Board and affiliates to do advocacy work on their own.

Current issues go through a clear and consistent set of criteria that guides HFHC’s policy agenda. The organization has a clear process that details what issues the organization will support, and at what level. Staff and Board ask whether issues directly relate to affordable housing, and how taking a position may align or alienate the organization with stakeholders it

may want to work with in the future. (See HFHC's legislative criteria tool, Addendum 1.) The organization is actively engaged in conversation about the current issue of state fiscal reform and how the issue is connected to health care, education, and other human services, and has successfully advocated in both legislative issues and ballot initiatives. Utilizing an online advocacy tool, social media, and the networks of volunteers, homeowners, and donors that affiliates have developed across the state, HFHC will continue to leverage the Habitat for Humanity brand to develop policies that reduce the number of Coloradoans living in poverty.

In addition, HFHC is building on its successes by branching out into homeowner engagement including voter registrations. HFHC recognizes that if they are to create thriving communities, Habitat homeowners need to be involved in their neighborhoods. Affiliates already provide homeownership preparation classes; it seemed a natural extension to train partner families on civic engagement as well. While voting is of course empowering for partner families, it helps HFHC's lobbying efforts as well. Homeowners have powerful stories – stories that decision-makers want and need to hear. By engaging partner families in advocacy efforts, HFHC is recruiting new voices for the important issue of affordable housing, and raising new leaders in the fight to eliminate poverty.

Conclusion

Ultimately, the spark of leadership is an important catalyst for change within an organization. However, building broader buy-in for advocacy work at all levels of the organization – including the Board of Directors – is critical for an organization's success in public policy advocacy efforts.

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Addendum 1: Legislative Criteria

To become established as a public policy priority, an issue should meet the following criteria:

1. Be Consistent with Habitat's Values:
 - SERVICE to God's people, to the mission of HFHI, to Colorado affiliates, to partner families, to its stakeholders and investors, and to its board and staff
 - INNOVATION in seeking new solutions, new resources, and new collaborations in order to meet challenges and overcome limited resources
 - DIVERSITY of the strengths, talents, backgrounds, and communities represented by our affiliates, our board members, our stakeholders and investors, and our board and staff
 - STEWARDSHIP of the abundance of gifts we are given, and accountability to our affiliates, to our parent organization, to our stakeholders and investors, and to the community at large.
2. Be consistent with Habitat's mission principles:
 - Everyone should have access to safe, decent, affordable housing
 - The community should work to eradicate substandard and poverty housing worldwide.
 - Habitat for Humanity of Colorado partners with stakeholders to create thriving communities and to help support healthy families.
 - Habitat for Humanity of Colorado supports affiliates by increasing their access to resources
 - Affordable housing is the foundation of stable families, neighborhoods and communities
3. Have an impact on multiple affiliates
4. Have a significant impact on Habitat partner families and/or Habitat homeowners
5. Help align our mission with our stakeholders:
 - Has HFHI taken a position*
 - Have affiliates taken a position
 - Is it a partisan issue
 - Will it help build relationships with current or future partners

* Special consideration will be given to issues prioritized by the Habitat for Humanity International Washington Office